Ontario Council on University Affairs

Eleventh Annual Report March 1, 1984 to February 28, 1985

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Letter of Transmittal

Ontario
Council on
University
Affairs

416/965-5233

7th Floor
700 Bay Street
Toronto, Ontario
M5G 1Z6

February 28, 1985

The Honourable Keith Norton,
Minister of Education, Colleges & Universities,
22nd Floor, Mowat Block,
Queen's Park,
Toronto,
Ontario.

Dear Mr. Norton,

I respectfully submit herewith the Eleventh Annual Report of the Ontario Council on University Affairs, which covers the period from March 1, 1984 to February 28, 1985.

Yours sincerely,

Marnie Palkin

Marnie Palkin
Chairman

Letter of Transmittal

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Marnie Paikin

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Chairman

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Charles N. Armstrong (1985)
Ottawa

Susanne Aziz (1987)
London

Jean-Michel Beillard (1986)
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London

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Brian O'Riordan
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Susan Pape
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Paul Stenton
Research Officer

Barry Yeates
Research Officer

(Members' terms expire on February 28 of the year indicated in parenthesis)

**Resigned before term expired.*

Introduction

Introduction

The Eleventh Annual Report of the Ontario Council on University Affairs covers the period March 1, 1984 to February 28, 1985 and contains the full text of all Advisory Memoranda issued during the year. In addition, the present report contains the text of a paper released by Council in September 1984 entitled: "A Financial Analysis of the Ontario University System - 1984." As usual, the report also contains a list of Council's public meetings for the year and the response of the Government to the recommendations made by Council.

A Financial Analysis of the Ontario University System - 1984

Executive Summary

The Ontario Council on University Affairs analyzes, in this paper, the financial circumstances of Ontario universities during the period 1977-78 to 1982-83 by examining what has happened to revenues, expenditures and commonly used measures of quality.

During the period 1978-79 to 1982-83, Ontario universities' real income and expenditures declined and then rose so that they averaged 3.9% and 4.6% less, respectively, than the 1977-78 levels. In 1982-83, however, real annual university system revenue and expenditures surpassed their 1977-78 levels by about 1%. Despite the constraint on resources available to Ontario universities since 1977-78, these institutions have increased their level of activity in the key areas of instruction (where FTE enrolment increased by 10.7%) and sponsored research (where real expenditures increased by 34.5%) and have been able to show an overall current year surplus throughout the period examined (*Section A.1*).

The real decline in resources available was more severe for those areas of activity that are most dependent on Provincial Government support (the operating fund and the capital fund). The only areas of activity to experience a decline in the share of total revenue available to Ontario universities during the period 1977-78 to 1982-83 were the operating fund and the capital fund. During the period 1978-79 to 1982-83, real operating income and real capital income averaged 6.9% and 38.8% less, respectively, than in 1977-78.

While the majority of operating income continues to come from Provincial Government grants, the share of total operating income from this source declined from 81.8% in 1977-78 to 77.4% in 1982-83. In comparison with universities in other provinces, Ontario universities receive a smaller proportion of total operating income in the form of operating grants. During the period 1977-78 to 1983-84 Ontario universities operating grants increased by only 59.9%. On the other hand, total Provincial Government budgetary expenditures (excluding debt servicing) increased by 88.5%, indicating that, since 1977-78, the universities' share of Government resources declined significantly (*Section B.1(c)*).

In comparison with universities in other provinces, Ontario universities have fared poorly in terms of Government operating support and operating income. In 1981-82, Ontario ranked tenth in operating grants per FTE student and ninth in operating income per FTE student. Government operating support and total operating revenue received by Ontario universities have also lagged behind those received by elementary and secondary schools in the Province (*Sections B.1 (a), (c)*).

In recent years, as a result of the constraints on Provincial Government operating grants, Ontario universities have had to rely more heavily on other sources of operating income. The share of operating revenue from student fees increased from 16.0% in 1977-78 to 19.1% in 1982-83. Similarly, the share of operating revenue from sources other than Provincial Government grants and student fees increased from 2.2% to 3.5% during this period. However, Council believes that these sources of income cannot be expected to increase significantly and therefore cannot be expected to compensate for shortfalls in Government support. Based on its past operating grants recommendations, Council estimates that, at a minimum, an additional $115 million dollars in operating income was necessary in 1982-83 to bring the level and quality of service provided by the universities up to that provided by the universities in 1977-78 (*Sections B.1 (d), (e) and (f)*).

The constraints on the level of operating income mentioned above have had a direct effect on the level of operating expenditures. Since 1977-78, real operating expenditures have averaged 6.9% less than the amount spent in 1977-78. The universities have been able to adjust to constrained revenue and increasing and shifting enrolment with only minor shifts in expenditures. Since 1977-78, the split between academic and non-academic expenditures has remained virtually unchanged.

Within the academic expenditure area there has been little change in the share of expenditures for instruction and research and library resources, and a slight decline in the academic computing share of expenditures. Within the non-academic operating expenditures there has been a shift in expenditures away from physical plant and toward the other non-academic functional areas, particularly toward administration, and non-academic computing (*Section B.2 (a)*).

There has also been little change in the share of resources devoted to salary-related expenditures and non-salary expenditures. Expenditures on the major objects of expense — library acquisitions, operational supplies and expenses, utilities, and the two non-faculty salary categories of other instruction and research and other salaries and wages — declined more severely than did other objects of expense (*Section B.2 (b)*).

While the constraints on operating revenue have been significant, the constraints on capital revenue have been even more severe. From 1976-77 to 1983-84, Government support for capital expenditures has fallen short of Council's total recommendations by $106.3 million. However, capital income from non-Governmental sources has been even more constrained than from Provincial Government sources (*Section C.1*).

Sponsored research funding has increased significantly in recent years. It falls short, however, of the level necessary to reach the Federal Government's target for 1985. One of the major concerns of Ontario universities is the funding of overhead costs for these increased research activities. With the constraints on other areas of revenue, it is difficult for the institutions to absorb these costs and to continue to increase their research efforts (*Section D*)

September, 1984
Ontario Council on University Affairs

Introduction

Since its establishment, the Ontario Council on University Affairs has advised Government annually on the level of funding required to maintain Ontario's universities. Each year since 1977-78, Government operating grants have fallen short of Council's funding recommendations. Beginning in 1979, Council has published annually financial papers which examine Government's funding policies and analyze their impact on the university system.[1] In this paper, Council updates and expands its analysis to provide a broader picture of university finances since 1977-78.

In this paper, Council analyzes the financial circumstances of Ontario universities by examining:

(i) the level of, and the real increases and decreases in, resources available and deployed within the universities;
(ii) the degree of flexibility associated with various sources of revenue and the division of the universities' activities and financial reporting;
(iii) any shifts in sources of revenue and in expenditures in both current and constant dollars; and
(iv) the cause of any shifts in resources and priorities.[2]

In addition to analyzing the financial circumstances of Ontario universities, this paper also tries to examine the effect of these circumstances by assessing their impact on the quality of the university enterprise. In its Spring 1983 hearings, Council discussed with representatives of the universities the impact of underfunding on the quality of university scholarship, research and education. Most institutions indicated that the quality of scholarship and research was extremely high. However, most institutions found it difficult to assess the impact of financial restraint on the quality of university education.

Council recognizes that it is extremely difficult to measure the quality and changes in quality of the "outputs" of the university enterprise, i.e., educated graduates and scholarly basic and applied research. Council believes, however, that there are measures of the "inputs" which go into producing educated graduates and scholarly research, such as student/faculty ratios, that are commonly used as indicators of quality which may shed some light on the overall quality of the university enterprise. Council realizes that while the use of these indicators is widespread, it is impossible to make conclusive statements about the overall quality of the "outputs" of universities based on such indicators. Council, therefore, restricts itself to assessing changes in the quality of the "inputs" during the period since 1977-78 and makes no direct assessment of the level of quality of the "outputs" beyond providing inferential evidence of a change.

(A) TOTAL UNIVERSITY REVENUE AND EXPENDITURES

In order to present and assess several years of information, Council limits itself to an examination of system-wide or global financial circumstances and trends. Council recognizes that the circumstances of individual institutions are varied and may differ radically one from another. Indeed, in recent years for example, the financial

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1. OCUA, *System on the Brink:A Financial Analysis of the Ontario University System - 1979*, September, 1979.
OCUA, *A Financial Analysis of the Ontario University System - 1980*, September, 1980.
OCUA, *A Financial Analysis of the Ontario University System - 1981*, December, 1981.
OCUA, *A Financial Analysis of the Ontario University System - 1982* , December, 1982.

2. The Ontario university system generally refers to the provincially-assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education (OISE), and the Ontario College of Art (OCA). However, for most of the financial data provided in this report, consistent information throughout the period examined was available only for the universities, Ryerson, OISE, OCA, Nipissing, Algoma and Hearst. It was not available for the remaining affiliated and federated colleges.

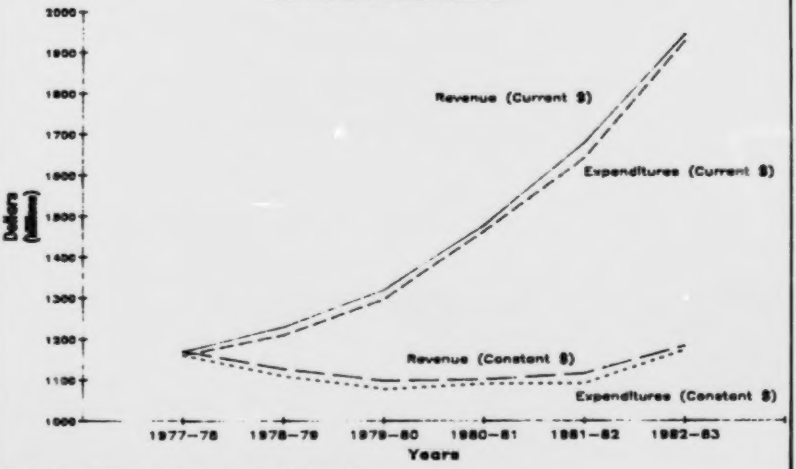
circumstances experienced by Ontario universities varied from marginal increases in revenue and expenditures for institutions with stable or declining enrolment to substantial increases in revenue and expenditures for institutions with rapidly increasing enrolment levels. Similarly, the accumulated deficit or surplus position of Ontario universities varies widely from institution to institution. However, in this paper Council focuses on what has happened, in general, to the revenues, expenditures and activities of all Ontario universities and as a result the analysis may not reflect the particular experience of individual institutions.

A.1 LEVEL OF TOTAL REVENUES AND EXPENDITURES

Figure 1 illustrates in both current dollars and constant 1977-78 dollars the total revenues and expenditures for Ontario universities for the period 1977-78 to 1982-83.[3] During this period, total annual university revenue increased by 66.2% (from $1,169.5 million in 1977-78 to $1,943.3 million in 1982-83), while total annual university expenditures increased by 66.0% (from $1,160.4 million in 1977-78 to $1,926.8 million in 1982-83). As Figure 1 indicates, since 1977-78, in all but the most recent year for which data are available (1982-83), Ontario universities received less real income and expended less in real terms than in 1977-78. During the period 1978-79 to 1982-83, Ontario universities' real income and expenditures averaged 3.9% and 4.6% less, respectively, than their 1977-78 income and expenditures. In 1982-83, however, the university system received 1.1% more real revenue and spent 1.0% more in real expenditures than in 1977-78. However, cumulatively, the universities have absorbed a $255 million reduction in real income (1977-78 dollars) and a $267 million reduction in real expenditures over the period 1977-78 to 1982-83.

FIGURE 1

Total Ontario University System Revenue and Expenditures In Current and Constant 1977-78 Dollars: 1977-78 to 1982-83



Source: Tables 1 and 2 of Appendix.

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[3] Because 1977-78 was the last year Government accepted Council's advice on the level of operating grants, wherever possible in this paper Council uses 1977-78 as the base year for the revenue and expenditure measures examined. Where appropriate, the price deflators used to deflate revenue and expenditures in real terms throughout this paper are composite indexes of the Consumer Price Index (CP) and all or portions of the Ontario Universities' Non-Salary Price Index (OUNSPI) in proportion to the share of expenditures on salary-related expenditures and non-salary expenditures.

Figure 1 also indicates that the university system showed overall current-year surpluses throughout this period, ranging from 0.8% of total revenue in 1977-78 to 2.3% of total revenue in 1981-82. These amounts may be misleading, however, since current-year total revenue and total expenditure data do not take into account restrictions on the use of universities' financial resources nor do they identify either funds appropriated for future expenditures or accumulated reserves or deficits. In addition to these problems with current-year surplus/deficit information, the data are aggregated for the entire university system and do not reveal individual institutions' financial circumstances.

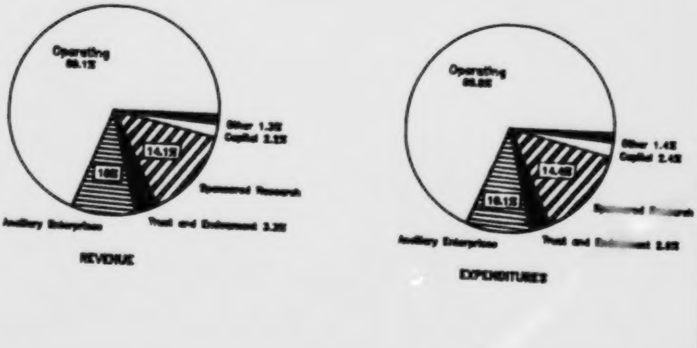
A.2 DIVISION OF TOTAL REVENUE AND EXPENDITURES

As mentioned, many of the financial resources available to Ontario universities have limitations or restrictions on their use. These resources must be used in accordance with: Government regulations; activities or objectives specified by private donors; restrictions or limitations imposed by other sources outside the institution; and/or directives issued by governing bodies of the institutions. To ensure that these limitations and restrictions are observed, the institutions, for accounting and reporting purposes, classify and segregate, under several funds, the various university activities and resources available for these activities.

The Committee of Finance Officers - Universities of Ontario (COFO-UO) identifies three "general funds" and three "restricted funds" under which all university activities and revenues and expenditures can be classified. The general funds - operating, other (non-credit) and ancillary enterprises - include the revenues and expenses associated with the universities' primary function of instruction and research, non-credit instruction, and supplementary services in support of these activities. The "restricted funds" - and sponsored research, trust and endowment, and capital - include the revenues and expenses associated with research activities and projects supported by external grants, expendable gifts, benefactions and grants available for special

FIGURE 2

Proportion of Ontario University Revenue and Expenditures by Fund: 1982-83



Source: Tables 1 and 2 of Appendix.

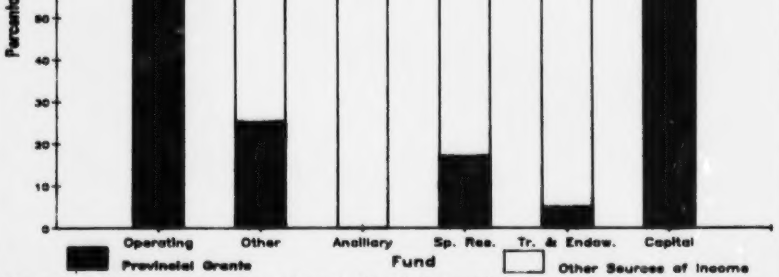
purposes, and capital projects.[4]

The proportion of Ontario universities' total revenue and expenditures accounted for by each fund or area of activity in 1982-83 is displayed in Figure 2. It is clear from this figure that the majority of university resources is directed towards the operating fund. While being integral areas of university activity, the resources available and expended in each of the other funds of Ontario universities - sponsored research, ancillary enterprises, trust and endowment, capital and other (non-credit) - are of much less financial significance than the operating fund.

The share of total income from provincial sources has dropped from 63.5% in 1977-78 to 58.0% in 1982-83. Table 1 of the Appendix illustrates the shifts in the share of total resources available to each fund in recent years, outlining the total revenues by fund over the period 1977-78 to 1982-83. In general since 1977-78, those areas of university activities whose revenues are less dependent on Provincial Government support for income have increased more rapidly than those areas more dependent on Provincial Government support. Figure 3 illustrates the degree to which each fund was supported by Provincial Government grants and contracts in 1982-83. In real terms, during the period 1978-79 to 1982-83, annual income for the areas of university activity which are less dependent on the Provincial Government for revenue activities averaged higher than the respective 1977-78 income figures: 17.0% for sponsored research, 15.2% for trust and endowment supported functions, 2.2% for ancillary enterprises and 21.0% for non-credit instruction. Each of these funds' share of total university system revenue increased during this period. On the other hand, the share of total revenue for two funds which depend heavily on Provincial Government support, the operating fund and the capital fund, declined from 1977-78 to 1982-83. During this period, real operating income averaged 6.9% less than in 1977-78 and real capital income averaged 38.8% less than in 1977-78. It should be noted that, in

FIGURE 3

Percentage Share of Revenue from Provincial Government Grants and Contracts by Fund: 1982-83



Source: Tables 4, 6, 8, 12, 19 and 23 of Appendix.

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[4] See Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities, 1982-83*, Volume 1 - Universities, pp. 1-15, for an explanation of university accounting procedures and definitions of various funds.

the case of the capital fund, non-government capital income declined by a greater degree than Government capital grants.

Changes in university system expenditures in the various funds closely followed the changes in revenue available. As indicated in Table 2 of the Appendix, during the period 1977-78 to 1982-83, the only funds to experience a decline in share of total university expenditures were the operating fund and the capital fund. During the period 1978-79 to 1982-83, operating expenditures averaged in real terms 6.9% less than in 1977-78 and real capital expenditures averaged 41.2% less than in 1977-78. During this period, the remaining funds' real expenditures averaged higher than in 1977-78: 25.1% for Other (non-credit), 2.1% for ancillary enterprises, 15.6% for sponsored research, and 9.6% for trust and endowment.

Table 3 of the Appendix displays the aggregate 1982-83 year-end fund balances for the Ontario university system. Ontario universities had an accumulated deficit of $3.2 million in unappropriated operating funds. However, many institutions had sizable end-of-year balances in their restricted funds or as appropriated operating reserves. In particular, there were $144.3 million in unappropriated reserves in the universities' trust and endowment funds, $86.7 million in unappropriated reserves in sponsored research funds and $23.1 million in unappropriated reserves in capital funds. These funds are, however, designated as restricted and cannot, for the most part, be used for general operating expenditures to offset an operating fund deficit. For example, much of the reserves found in the trust and endowment funds of Ontario universities are from donations solicited in institutional fund-raising drives which are designated for expenditures for specific purposes. As such, these funds should not be looked upon as another source of revenue which can augment the universities' traditional sources of general operating revenue. Council feels strongly that the widespread use of such donations to increase general operating revenue could very well jeopardize future fund-raising drives if donors felt their donations were merely replacing inadequate Government funding. In any case, upon closer examination of information concerning individual institutional fund balances, it also appears that those institutions with relatively large operating fund deficits do not have large reserves available in other funds which could be used to offset these deficits.

In this paper Council concentrates, for the most part, on three funds: the operating fund, the capital fund, and the sponsored research fund. Each of these funds relies heavily on Provincial or Federal Government support to fund its activities.

Before examining these funds in detail, Council notes that each of the other funds - the other (non-credit) fund, ancillary enterprises fund, and the trust and endowment fund - relies more heavily on non-governmental sources of revenue as can be seen in Tables 4, 6 and 8, and is less central to the primary function of universities, that of providing credit instruction and research.

The other (non-credit) fund refers to revenues and expenses associated with providing non-credit instruction. The ancillary enterprises fund covers services provided by universities which are supplementary to the primary function of credit instruction and research. The trust and endowment fund accounts for expendable gifts, benefactions and grants available for special purpose as stipulated by donors. As Tables 4, 8, 12, 19 and 23 indicate, in 1982-83, about $23.7 million was transferred from this fund to the operating fund, other (non-credit) fund, sponsored research fund and the capital fund.

(B) THE OPERATING FUND

The operating fund of universities accounts for the costs associated with performing the majority of university activities: credit instruction; non-sponsored research; academic support services (library, computing and student services); administration; and plant maintenance. In 1982-83 about 69% of total university system revenues and expenditures were accounted for by the operating fund. As Table 1 of the Appendix shows, this proportion is down from the approximately 74% share of total revenues and expenditures accounted for by the operating fund in 1977-78. Despite this decline in share of revenue and expenditure, it appears the overall level of activity accounted for by this fund has not diminished, and, as illustrated below, in some areas, such as instruction, it has increased.

B.1 OPERATING REVENUE

B.1 (a) Level of Operating Revenue

Since 1977-78, operating income increased by 56.3% in current dollars and averaged in real terms 6.9% less than the amount received in 1977-78. Real income improved slightly in 1982-83, but still remained 4.8% below the 1977-78 level. However, if transfers from other university funds are excluded from the operating income total, and only the income from normal operating sources is considered, then real operating income from these sources averaged 7.2% below the 1977-78 level.

Council places this decline in real resources in perspective by comparing Ontario universities' operating revenue with that of universities in other provinces and with that of elementary and secondary schools within the province. These comparisons are made on a per student basis, enabling Council to compare the level or changes in the level of financial resources available to jurisdictions of differing size and also to place in perspective the financial resources available to Ontario universities to support the "inputs" necessary to educate their students.

Council has noted, on a number of occasions, that Ontario universities have faced more severe constraints on operating revenue than universities in most other provinces. Table 10 of the Appendix presents the total operating income per full-time equivalent (FTE) student for each province for the years for which data are available, 1977-78 to 1981-82. In 1979-80, Ontario dropped from sixth to ninth position among all provinces in operating income per student and continued to hold that position while the gap between Ontario and the other provinces widened. During the period shown, Ontario's real operating income per student averaged 12.9% below the level of the other provinces in Canada.

Figure 4 indicates that, throughout the period, Ontario universities have lagged behind those of Quebec, the Western provinces and the Atlantic provinces in the level of annual real operating income per student.

Council has also illustrated in previous financial papers that the severe financial constraints on operating activities experienced by Ontario universities contrast sharply with operating revenue increases for elementary and secondary schools. This trend continued in 1982-83.

Table 11 of the Appendix and Figure 5 present comparable indexes of university operating revenues and elementary and secondary school operating revenues for the period 1977-78to 1982-83. The university index uses provincial grants plus tuition fees as a proxy for operating revenue (these two sources of income account for over 96% of Ontario universities' operating income). It measures, in constant 1977-78 dollars, the operating revenue per FTE student received by Ontario universities over this period. Provincial grants plus local tax revenues are used as a proxy for total operating revenue for the index of elementary and secondary school operating revenues. This index measures, in real terms, provincial grant plus local tax revenue per pupil received by Ontario elementary and secondary schools over the same period.

These indexes show that school revenue per pupil rose 4.5% in real terms between 1977-78 and 1982-83.[5] At the same time, university revenues per student declined by 15.8%. In the most recent year for which data are available (1982-83), university revenues per FTE student declined in real terms by 0.9%, while elementary and secondary school revenues per pupil increased by 2.5%.

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[5] Whenever elementary and secondary school comparisons are made in this paper, Provincial grants include the provincial contribution on behalf of teachers to the Superannuation Fund and Superannuation Adjustment Benefits.

B.1 (b) Sources of Operating Revenue

A breakdown of the sources of revenue that comprise operating income, and their values for the years 1977-78 to 1982-83, are presented in Figure 6 and Table 12 of the Appendix. As can be seen from Figure 6, throughout this period the majority of operating income for Ontario universities came from Provincial Government operating grants. However, this Figure also displays a noticeable increase in the share of operating income from student fees and from other sources of operating income. Most of the increase in other income came from investment income and transfers from other funds within the universities - notably from trust and endowment funds.

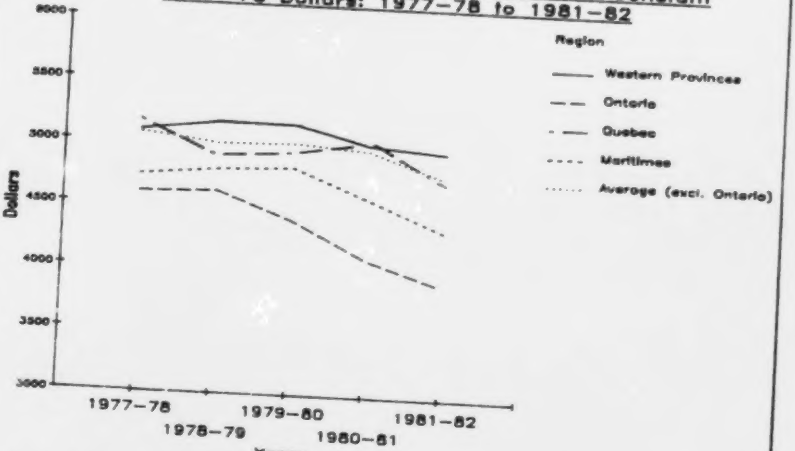
While all Provincial Governments have declared policies of fiscal restraint, in comparison with other Canadian jurisdictions, Ontario universities receive the smallest proportion of their operating resources from Provincial Government grants. Ontario universities receive a larger share of their operating revenue from student fees than institutions in other provinces. However, as indicated by [illegible] the higher level of fee income received by Ontario universities is not [illegible] operating income per student to the level found at most institutions [illegible].

Provincial Government policies directly limit or [illegible] the use of about 90% of total university system operating revenue to the broad category of "eligible university operating expenditures". Under the conditions set out in *The Ontario Operating Formula Manual*, formula grants and formula fees must be used for:

> . . . any eligible university operating expenditures, i.e., all operating expenditures except those -
>
> a) in connection with assisted/sponsored research,
> b) for principal and interest payments on capital indebtedness,
> c) for student aid,

FIGURE 4

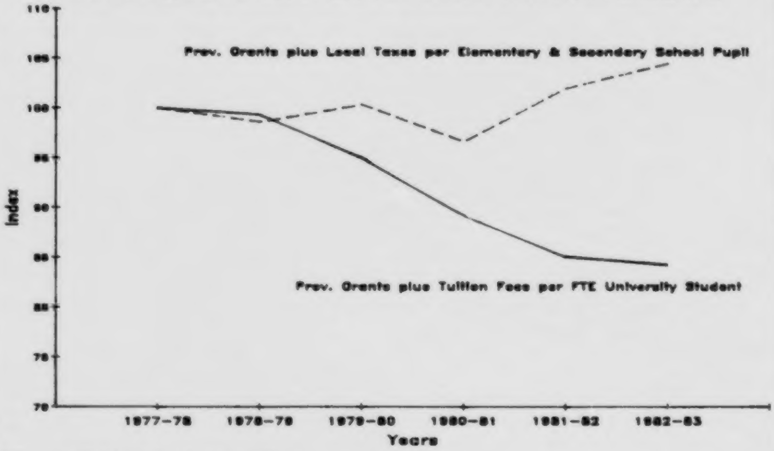
Interprovincial Comparison of Real University Revenue Total Operating Income per FTE Student, in Constant 1977-78 Dollars: 1977-78 to 1981-82



Source: Table 10 of Appendix.

FIGURE 5

Indexes of Revenue per Student in Universities and in Elementary and Secondary Schools in Ontario: 1977–78 to 1982–83 (Constant 1977–78 Dollars, 1977–78 = 100.0)



Source: Table 11 of Appendix.

d) for ancillary enterprises,
e) for capital projects.[6]

However, because of the broad scope of activities permitted under "eligible university operating expenditures", the institutions retain a fair degree of flexibility in allocating these resources.

The remaining Provincial Government operating grants are generally allocated for specific purposes. However, the degree of flexibility allowed in using these grants varies significantly, with some grants not having specifically defined limitations on their use (for example, Northern Grants), while others are restricted to specific expenditures (for example, municipal tax grants). Non-formula tuition fees have no Government restrictions or limitations placed on their use.

The other external sources of operating income such as the Federal Government, municipal governments, private donors and foundations may impose restrictions or limitations on the use of funds allocated to Ontario universities. However, given the information available, it is not possible to determine the extent to which the use of these funds is restricted. Similarly, it is difficult to determine if these funds or internal sources of operating income, such as investment income or interfund transfers, have limitations placed on their use by the governing bodies of the institutions.

B.1 (c) Operating Grants

While the share of total operating income represented by Provincial Government operating grants has declined in recent years, it remains the universities' primary source of operating income. In 1982-83, Government operating grants from the Ministry of Colleges and Universities (MCU) accounted for 76.5% of total operating income, down from 81.4% in 1977-78. Since 1977-78, the universities have received annual increases in operating grants of 5.8%, 5.1%, 7.2%, 10.1%, 12.2% and 8.6% (1978-79 to 1983-84).[7] Over the entire period, university operating grants increased by 59.9%. In comparison, Government budgetary expenditures (excluding debt servicing) increased annually by 6.7%, 9.9%, 12.5%, 18.4%, 12.1% and 7.7% for the same six years (1978-79 to 1983-84) resulting in an increase for this period of 88.5%. Thus, the universities' share of Government budgetary expenditures has declined since 1977-78. If the universities' share of total Government budgetary expenditure (excluding debt servicing) had been maintained at the 1977-78 level, the universities would have received an additional $700 million over the last six years.

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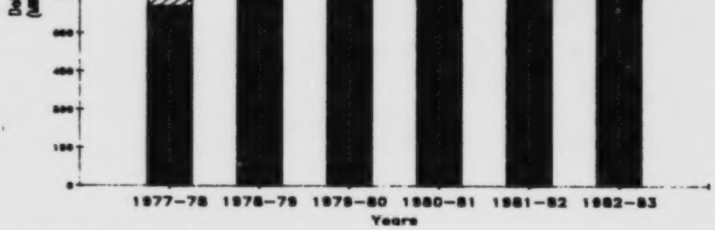
[6] Ministry of Colleges and Universities, *The Ontario Operating Formula Manual*, November, 1983, p. 2.

Table 13 of the Appendix provides a breakdown of the types of operating grants received by Ontario universities during the years 1977-78 to 1982-83 from the Ministry of Colleges and Universities. On average, each year about 98% of Ontario university grants are allocated according to an enrolment-related formula (formula grants). The remaining extra-formula or non-formula line-item grants are allocated to the institutions for particular purposes (the levels of which are determined by a variety of means). Since 1977-78, total MCU operating grants have averaged 8.9% below their 1977-78 level in constant 1977-78 dollars.

As noted previously, in comparison with universities in other provinces, Ontario universities have fared poorly in terms of Government operating support. Table 14 of the Appendix shows the provincial operating grants per FTE university student for each province in Canada, and also the weighted average grant per FTE university student for the nine provinces excluding Ontario, for the period 1977-78 to 1981-82. This indicator measures the level of government support made available to universities, taking into account the number of students supported by these funds.[8] Over the

FIGURE 6

Operating Revenue by Major Source: 1977-78 to 1982-83



Source: Table 12 of Appendix.

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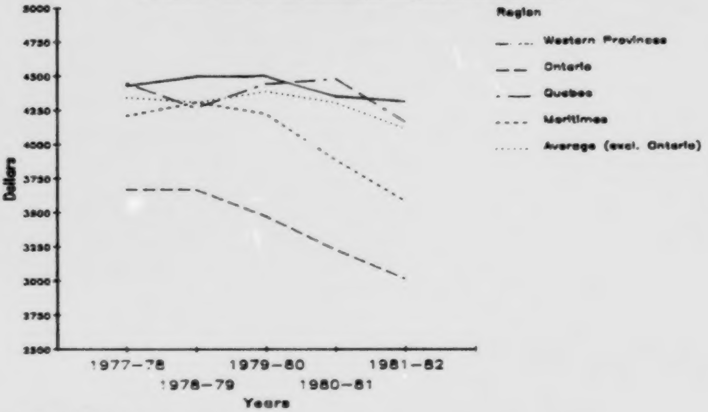
[7] The 1983-84 increase of 8.6% includes $12 million (1.1%) as a special one-time grant towards institutional expenditures on equipment for use in teaching undergraduates and on library equipment and acquisitions.

[8] Operating grants include: (i) funds provided for the operation of institutions within the province, (ii) funds provided to other provincial governments to support the training of students originating in the province but enrolled in special programs in institutions located outside the province.

FIGURE 7
Interprovincial Comparisons of Real University Grants
Provincial Operating Grants per FTE Student, in Constant
1977-78 Dollars: 1977-78 to 1981-82



Source: Table 14 of Appendix.

period indicated, Ontario declined in rank from eighth to tenth position. Since 1977-78 (1978-79 to 1981-82), Ontario universities' real operating grants per student averaged 8.8% below the 1977-78 level while real operating grants per student in the other provinces in Canada averaged, in 1977-78, 18.5% above the 1977-78 Ontario level and in subsequent years averaged 20.6% above the 1977-78 Ontario level. Ontario's position, relative to other regions in Canada (the Western provinces, Quebec and the Atlantic provinces) and to the weighted average of the other nine provinces, is illustrated graphically in Figure 7.

Information provided by the Council of Ontario Universities (COU) suggests that in terms of operating grants per student, the position of Ontario universities vis-a-vis universities in other provinces improved marginally in 1982-83 and 1983-84.[9]

In recent years, all sectors of education in Ontario have received a substantially reduced share of total Government budgetary expenditures. From 1977-78 to 1982-83, the share of total Government budgetary expenditures for elementary and secondary schools declined by 16.6%, the share for universities declined by 15.9% and the share for Colleges of Applied Arts and Technology (CAATs) declined by 12.4%. During that period, enrolment in elementary and secondary schools declined by 8.4%, whereas enrolment in universities increased by 10.7% and full-time post-secondary CAAT enrolment increased by over 46.6%.

Table 15 of the Appendix presents, in constant 1977-78 dollars, indexes of provincial grants per student for universities and for elementary and secondary schools, for the period 1977-78 to 1982-83.[10] Figure 8 displays the same information in

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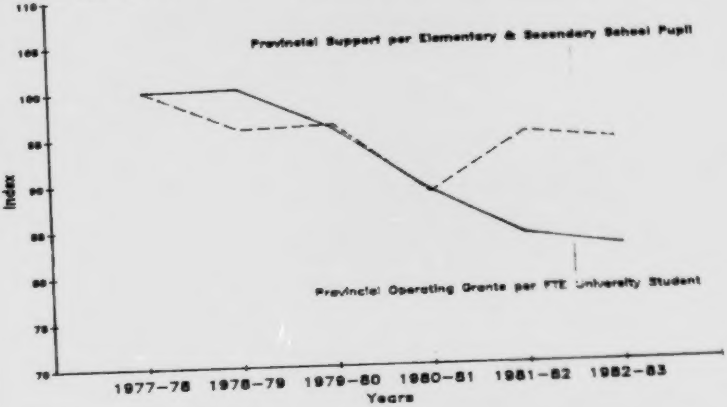
[9] Council of Ontario Universities, *Brief to the Ontario Council on University Affairs on Operating Grant Requirements for 1985-86*, Table 4, p. 17.

[10] Council has noted in the past the desirability of the inclusion of comparable indexes of provincial support revenue per FTE student for the other major education sector in the province – the CAATs. For the years prior to 1981-82 it is not possible to compile what Council considers to be the most appropriate comparative data – operating grants allocated to post-secondary programs per FTE post-secondary student in the CAAT's. The move to formula financing for the CAATs in 1981-82, however, has enabled Council to calculate, in a rough manner, post-secondary operating grants per student for the years 1981-82 and 1982-83.

FIGURE 8

Indexes of Provincial Support per Student in Universities and in Elementary and Secondary Schools in Ontario: 1977-78 to 1982-83 (Constant 1977-78 Dollars, 1977-78 = 100.0)



Source: Table 15 of Appendix.

graphic form. During this period, university operating grants per FTE student declined in real terms by 17.5%. Provincial support per elementary and secondary school pupil also decreased in real terms by 6.0%.

In 1982-83 post-secondary operating grants per post-secondary student in the CAATs declined in real terms by 5.8%. In comparison, provincial support per student for the universities declined in real terms by 1.7%, while provincial support per pupil for elementary and secondary schools decreased by 1.1%.

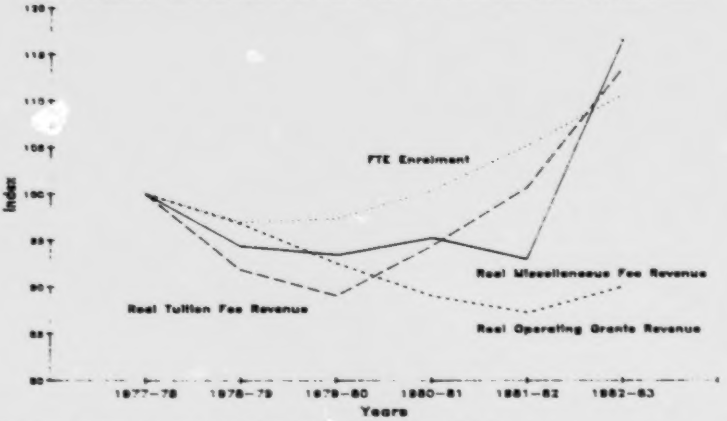
B.1 (d) Fee Revenue

As mentioned above, student fee revenue supporting operating fund activities has increased substantially in recent years. Table 12 and Figure 6 indicate that the share of total operating income from student fees increased from 16.0% in 1977-78 to 19.1% in 1982-83. Tuition fees accounted for 94.2% of total fee revenue in 1977-78. This decreased slightly to 94.1% in 1982-83. Since 1977-78, tuition fee revenue increased by 3.4%, 6.6%, 18.0%, 19.7% and 24.3% (1978-79 to 1982-83). This compares with formula tuition fee rate increases during these years of 0.0%, 5.0%, 7.5% (plus an additional 10% discretionary fee increase), 10% and 12%. The large increases in tuition revenue in the last three years have resulted from: (i) significant increases in enrolment since 1978-79 (during the period 1977-78 to 1982-83, FTE enrolment increased by 10.7%); (ii) a change in Government tuition fee policy to tie annual formula tuition fee rate increases to the annual percentage increase in operating grants, and which allows institutions to charge tuition fees up to 110% of the formula fee; and (iii) increased foreign student fee rates and numbers. By 1982-83, virtually all institutions were charging the maximum allowable tuition fees.

Income from other student fees related to operating fund activities (miscellaneous fees) increased by 91.4% during the period 1977-78 to 1982-83 but only accounted for 5.9% of total student fee revenue. This increase compares with an 86.6% increase in revenue from tuition fees and a 47.9% increase in operating grant revenue as cited above. Again, a portion of the increases in miscellaneous fee income is due to the

FIGURE 9

Indexes of Real Tuition Fee Revenue, Real Miscellaneous Fee Revenue, Real Operating Grants and FTE Enrolment; 1977-78 to 1982-83 (Constant 1977-78 Dollars, 1977-78 = 100.0)



Source: Tables 12 and 13; MCU, University Audit Reports.

increase in enrolment during this period. Figure 9 provides indexes comparing increases in tuition fee revenue, miscellaneous fee revenue, operating grants and FTE enrolment.

B.1 (e) Other Operating Income

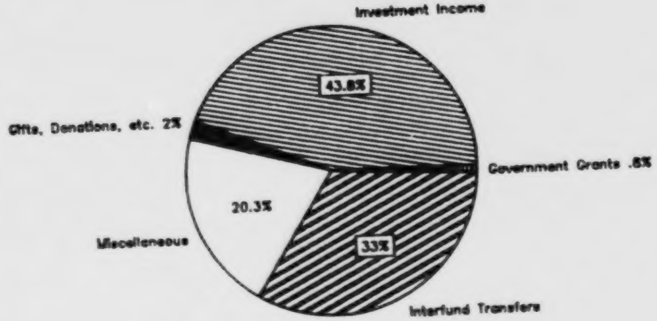
Section 3 of Table 12 of the Appendix outlines the operating income from sources other than Provincial Government grants and student fees. Income from these sources accounted for only about 3.5% of total operating income in 1982-83. This "other income" - from federal, municipal and other non-provincial government grants; gifts, donations and non-government grants; investment income; miscellaneous income; and interfund transfers - increased dramatically, by over 143%, since 1977-78.

As Figure 10 indicates, the largest source of other operating income in recent years has been investment income. During 1981-82 and 1982-83, Ontario universities benefited from high interest rates and realized substantial increases in investment income. Investment income for the universities increased by 145%, from $8.4 million in 1977-78 to $23.6 million in 1981-82, but declined to $20.4 million in 1982-83.

The second largest source of other operating income is from interfund transfers. As noted above, most sources of income for Ontario universities have restrictions placed on their use. However, there is flexibility in the use of a limited amount of resources among funds and areas of activity. This flexibility is reflected in interfund transfers. As Table 12 indicates, in each year from 1977-78 to 1982-83, the operating fund of the Ontario university system had a net inflow of financial resources from other university funds. Over this period, there was a 268% increase in interfund transfers into the operating fund, from $4.2 million in 1977-78 to $15.4 million in 1982-83. These funds have come predominantly from the trust and endowment fund, with lesser amounts coming from ancillary enterprises, and, in previous years, the sponsored research fund and other (non-credit) fund. It is clear that universities have been transferring funds from areas of activity normally supported by non-Governmental sources to expend in the predominantly Government supported operating fund.

FIGURE 10

Proportion of Other Operating Income by Source: 1982-83



Source: Table 12 of Appendix.

Total revenue from the remaining sources of "other operating income" (Federal, municipal and other government grants and contracts; gifts, donations and non-government grants; and miscellaneous income) is of relatively minor importance, equalling $10.8 million in 1982-83.

Even though there has been substantial increase in "other operating income" in recent years, because this represents only 3.5% of total operating income it is not probable that Ontario universities will be able to augment in a substantial manner their Governmentally controlled revenue (operating grants and formula tuition fees) with continued increases in revenue from "other operating income" sources.

B.1 (f) Summary of Operating Income

The fiscal year 1977-78 was the last in which Council believes the Ontario university system received an adequate level of operating income. Since that time real operating income has declined and has remained below the 1977-78 level. The reduction in real operating income has meant that there are fewer financial resources available to be spent on the inputs of the university enterprise such as instructors, library holdings, laboratory assistants and equipment. The magnitude of this decline in resources available has been significant when compared with the increased demands placed on universities in recent years. For example, operating income per FTE student declined significantly during the period examined, a phenomenon not shared by universities in most other provincial jurisdictions nor by elementary and secondary schools in Ontario.

The decline in real financial resources available was mainly the result of constraints on the level of operating grants provided by Government. The decline in real operating grants per FTE student was even greater than that found for real operating income per FTE students and compared more unfavourably with grant levels received by universities in other jurisdictions. Council estimates conservatively, based on its past operating grants recommendations, that, at a minimum, an additional $115 million dollars in operating income was necessary in 1982-83 to bring the level of service provided by the universities up to the level of service provided by the universities in 1977-78 (an 11% increase).

The following section of the paper examines how the universities have reacted to this shortfall and constrained operating income in general.

B.2 OPERATING EXPENDITURES

As indicated above, since 1977-78, Ontario university system operating expenditures have increased by 55.2% in current dollars and averaged 6.9% less than the amount expended in 1977-78 in constant dollars. Not surprisingly, changes in the real level of operating expenditures during the period 1977-78 to 1982-83 have tended for the most part, to follow changes in operating revenue and not changes in demands placed on universities (such as increased enrolment). Figure 11 illustrates these relationships by presenting indexes of real changes in operating revenues, operating expenditures and changes in enrolment.

As indicated in Figure 2 and Table 2 of the Appendix, in 1982-83, 68.9% of total university expenditures went towards operating activities such as instruction, non-sponsored research, academic support services, administration and plant maintenance. This proportion has dropped since 1977-78 when it stood at 73.7%.

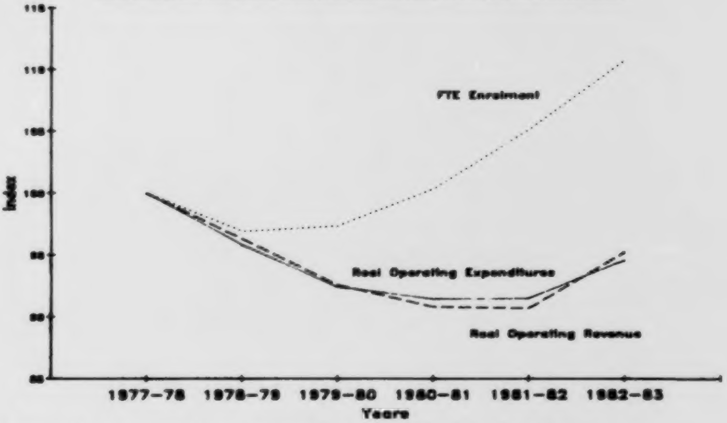
University operating expenditures can generally be categorized in two ways: (i) by functional areas; and (ii) by objects of expense. Functional areas refer to sectors of university activity such as instruction and research, academic support services, and administration. Objects of expense refer to those items on which funds are expended in order to carry out university activities, such as salaries and wages, benefits, furniture and equipment, and utilities.

B.2 (a) Operating Expenditures by Functional Areas

COFO-UO identifies seven functional areas or sectors of activity covered by operating expenditures: instruction and (non-sponsored) research; library; computing; student services; administration; physical plant; and other. These areas can be divided into

FIGURE 11

Indexes of Real Operating Revenue, Real Operating Expenditures and FTE Enrolment: 1977-78 to 1982-83 (Constant 1977-78 Dollars, 1977-78 = 100.0)



Source: Tables 1 and 2 of Appendix; MCU, University Audit Reports.

two main categories - academic and non-academic. The academic functional areas include instruction and (non-sponsored) research, library, and the portion of central computing used for academic computing. The non-academic functional areas of operating fund activities are student services, administration, physical plant, the remainder of central computing used for non-academic purposes, and other.

Table 16 of the Appendix displays for the years 1977-78 to 1982-83 the universities' operating expenditures under the categories academic and non-academic and by functional areas within these categories. As can be seen from this Table, there has been very little shift in the proportion of total operating expenditures going to each of the academic and non-academic functional areas. The shares of operating expenditures accounted for by instruction and research, library, and administration increased slightly, while the shares for computing and physical plant decreased slightly and student services and other remained unchanged. Figure 12 illustrates total real operating expenditures and the share of these expenditures spent on academic functions and non-academic functions for the years 1977-78 to 1982-83.

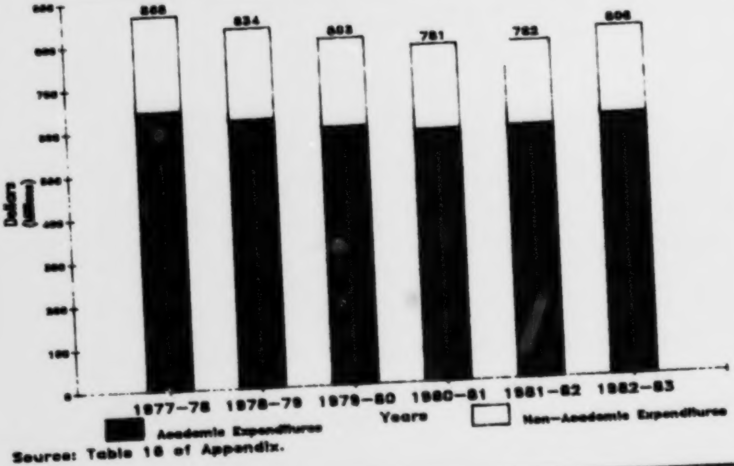
i) Academic Expenditures

Academic expenditures refer to those expenditures which directly support the primary function of universities, that of instruction and non-sponsored research and the supporting academic services of library operations and academic computer operations. In 1982-83, as illustrated in Table 16 of the Appendix, operating expenditures on academic instruction and research accounted for 74.2% of total operating expenditures. This proportion was up slightly from that found in 1977-78 (74.0%). Total academic operating expenditures increased by 53.3% during the period 1977-78 to 1982-83. Since 1977-78, real expenditures on academic activities averaged 7.3% less than in 1977-78.

One of the major factors affecting the demand for academic services is the level of enrolment. While real expenditures on academic functions declined by 6.4% from 1977-78 to 1982-83, total Ontario university FTE enrolment in credit programs/courses

FIGURE 12

Real Academic and Non-Academic Operating Expenditures in Constant 1977-78 Dollars: 1977-78 to 1982-83



Source: Table 16 of Appendix.

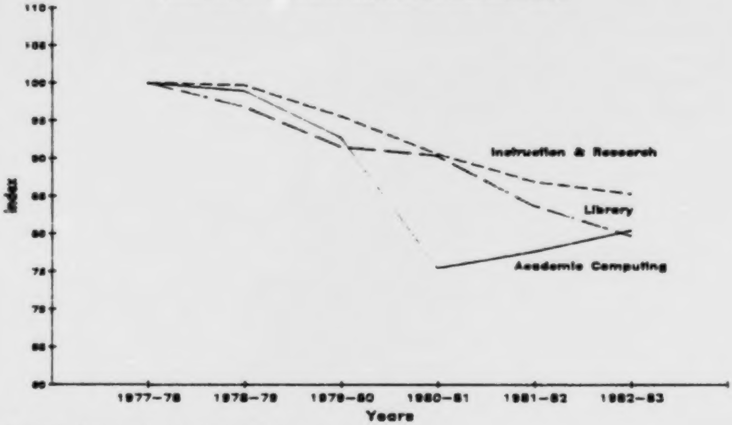


FIGURE 13

Indexes of Real Academic Operating Expenditures per FTE Student: 1977-78 to 1982-83 (Constant 1977-78 Dollars, 1977-78 = 100.0)

Source: Table 16 of Appendix.

increased by 10.7% to record high levels - 210,956 FTE undergraduate and graduate students. During the past year, 1983-84, Ontario university enrolment increased by a further 3.4%. There are 176,414 full-time undergraduate and graduate students and 41,683 FTE part-time undergraduate and graduate students enrolled in Ontario universities and their affiliated colleges, Ryerson Polytechnical Institute, and the Ontario Institute for Studies in Education, for a total FTE enrolment of 218,097.[11]

Figure 13 displays academic operating expenditures per FTE student in constant 1977-78 dollars for the period 1977-78 to 1982-83. As can be seen from this figure, there has been a marked decline in real academic expenditures per student, averaging 9.0% below the 1977-78 level. It is clear that while the level of enrolment has an important impact on the demands for academic services provided by universities, similar to operating expenditures in general, changes in real expenditures on academic functions show little relationship to changes in enrolment. Universities appear to have accommodated changes in total enrolment and enrolment shifts among disciplines without redirecting, in a significant way, their financial resources between non-academic and academic functional areas.

The majority of Ontario universities' operating expenditures is spent in the instruction and non-sponsored research functional area, which refers only to the credit instruction and non-sponsored research activities.[12] University expenditures in this functional area go toward the direct costs of faculties, academic departments, graduate schools, summer school, credit extension, deans' and departmental offices. As Figure 14 illustrates, credit instruction and non-sponsored research represented 64.8% of total operating expenditures in 1982-83, slightly higher than the 1977-78 level of 64.4%. Despite a 10.7% increase in enrolment by 1982-83, real expenditures on credit instruction and non-sponsored research declined by 5.6% and during this period averaged 6.8% below the 1977-78 level, resulting in the significant decline in the real instruction and non-sponsored research expenditures per student indicator found in Figure 13.

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[11] The enrolment data were drawn from Ministry of Colleges and Universities, *University Audit Reports: Financial Reports*, April 22, 1983, pp. 10-13 and April 5, 1984, pp. 10-13.

[12] The remaining instruction (non-credit) and research (sponsored and contract) activities are accounted for under the other (non-credit) and sponsored research funds.

The second largest academic expenditure area is the "library" functional area. It encompasses the universities' main libraries, branches and faculty and department libraries and all purchases of books and periodicals from operating funds. The share of total operating expenditures accounted for by this functional area has also remained virtually unchanged at 7.0% since 1977-78. Total library expenditures during this period declined in real terms by 11.8%.[13] As Figure 13 illustrates, on a per FTE student basis, real library expenditures declined by an even greater amount than real instruction and non-sponsored research expenditures during the period 1978-79 to 1982-83, averaging 11.7% less than the 1977-78 level.

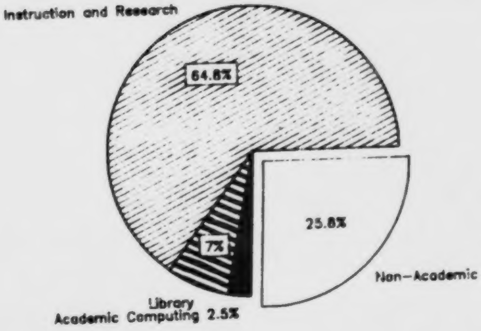
The final area of academic operating expenditures is "academic computing" which is 63.4% of the total "central computing" functional area. It includes instruction, research and library-related computing activities and operations carried out by central university computing facilities, and does not include academic computing activities and operations using computing facilities that are not centrally managed. The share of total operating expenditures represented by academic central computing has changed little from the 1977-78 level of 2.6%, dropping to 2.5% in 1982-83. During the period 1978-79 to 1982-83, academic central computing expenditures averaged 13.5% below the 1977-78 level in real terms. Real academic expenditures per FTE student averaged 15.0% below the 1977-78 during the subsequent five years.

ii) Non-Academic Expenditures

Non-academic expenditures refer to those operating expenditures which do not

FIGURE 14

Academic Expenditures by Functional Area as a Proportion of Total Operating Expenditures: 1982-83



Source: Table 16 of Appendix.

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[13] See Library section of Operating Expenditures by Objects of Expense for details on library acquisitions.

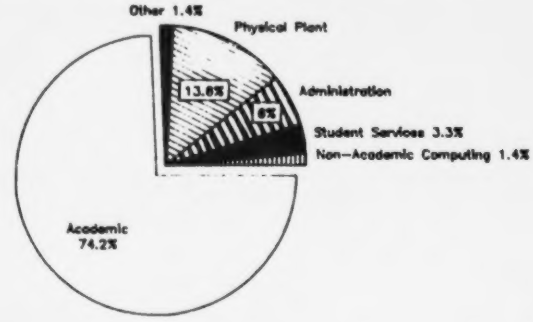
directly support the provision of instruction and research within Ontario universities. As noted above, these include expenditures in the following functional areas: physical plant; administration; student services; non-academic computing; and other. In 1982-83, operating expenditures on non-academic functional areas accounted for 25.8% of total operating expenditures, down from 26.0% in 1977-78. Total non-academic operating expenditures increased by 51.7% during the period from 1977-78 to 1982-83 in current dollars, and averaged 8.7% in real terms below the 1977-78 level since then.

As can be seen in Figure 15, the largest share of non-academic operating expenditures is spent on physical plant activities. Physical plant refers to the operation, management and maintenance of the physical facilities of Ontario universities and the services and costs generally provided for or covered by physical plant departments.[14] As Table 16 of the Appendix illustrates, physical plant's share of operating expenditures decreased from 14.3% in 1977-78 to 13.6% in 1982-83[15]. It was the only non-academic functional area to experience a decline in the share of non-academic resources. Total physical plant expenditures averaged 11.8% below the 1977-78 figure in constant dollars during the period 1978-79 to 1982-83. By 1982-83, real expenditures on physical plant declined to 13.2% less than the 1977-78 level.

The share of operating expenditures accounted for by administrative expenses increased from 5.7% in 1977-78 to 6.0% in 1982-83. During this period, real expenditures on administration, planning and information costs and activities associated with the offices of the senior administration, registrar, research administration, the secretariats of the governing bodies and senates, finance and accounting, personnel,

FIGURE 15

Non-Academic Operating Expenditures by Functional Area as a Proportion of Total Operating Expenditures: 1982-83



Source: Table 16 of Appendix.

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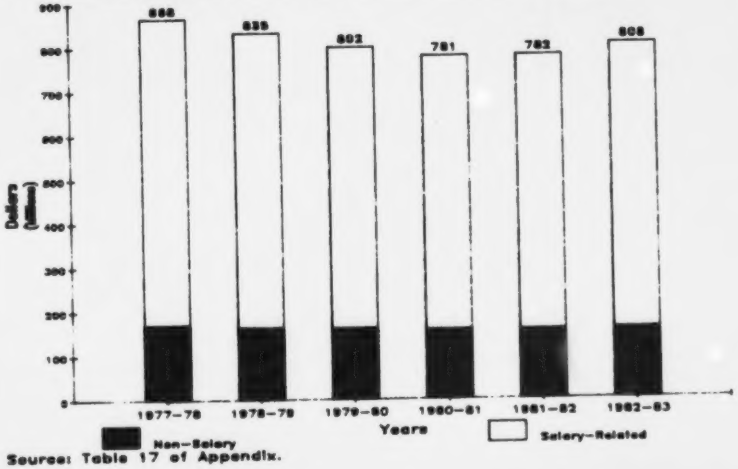
14. These include physical plant administration, building maintenance, custodial services, utilities, landscape and grounds maintenance, security and traffic control, purchasing and receiving, hauling and stocking of furniture, mail and messenger delivery, property taxes, vehicles and equipment, property, fire and liability insurance, renovations, alterations and major repairs, and space rental costs.

15. In 1981-82, COFO-UO altered its definition of physical plant to include property taxes for which a compensating grant is received from the Provincial Government, where previously these property taxes were accounted for under the "Other" functional area of the operating fund. The 1977-78 to 1979-80 proportions for physical plant shown in this section of the paper are adjusted for this change in definition by including all taxes under physical plant.

FIGURE 16

Share of Salary-Related and Non-Salary Operating Expenditures in Constant 1977-78 Dollars: 1977-78 to 1982-83



Source: Table 17 of Appendix.

purchasing, and institutional research averaged 1.9% below the 1977-78 level, but by 1982-83 were only 0.1% below the 1977-78 level. Most administrative expenses are found in salaries, wages and benefits. Interestingly, however, the proportion of total administration expenditures on these items declined from 90.3% in 1977-78 to 83.7% in 1982-83. Non-salary administration expenditures increased substantially during this period.

The student services' share of total operating expenditures remained relatively unchanged from 1977-78 to 1982-83 at 3.3%, but averaged 10.1% less than the 1977-78 level during the period 1978-79 to 1982-83 in real terms while enrolment averaged 2.1% higher.[16] The proportion of student services' operating expenditures spent on scholarship, bursaries, etc. increased from 20.3% in 1977-78 to 27.6% in 1982-83, while the salary-related expenditures' share of student services' expenditures declined from 61.5% to 54.2%.

The remaining non-academic functional areas shown in Table 16 of the Appendix, "non-academic computing" and "other", each accounted for only 1.4% of total operating expenditures in 1982-83.[17] The proportion of total central computing expenditures devoted to computing activities and operations that are not related to instruction, research and library operations and carried out by central university computing facilities increased from 34.1% in 1977-78 to 36.6% in 1982-83.

B.2 (b) Operating Expenditures by Object of Expense

As noted above, objects of expense refer to those items on which funds are expended in carrying out university activities. Objects of expense are generally divided into two categories: (i) salary-related expenditures; and (ii) non-salary expenditures. Salary-

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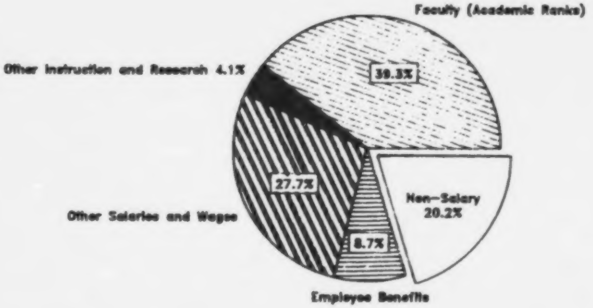
16. The "student services" functional area includes student counselling, athletics, placement services, student housing services, Dean of Students, student transportation services, grants to student transportation services, grants to student organizations, student program costs (for example for cultural, music and drama programs), and student centre costs.

17. The "other" functional area covers the remaining operating fund activities and expenses, including: the development office, alumni office, public relations, the administration of safety programs, convocation and ceremonies, professional fees, and insurance (excluding that covered by the physical plant function).

FIGURE 17

Salary-Related Expenditures by Object of Expense as a Proportion of Total Operating Expenditures: 1982-83



Source: Table 17 of Appendix.

related operating expenditures include the salaries, wages and benefits of faculty an staff. Non-salary operating expenditures include expenditures on library acquisitions equipment and furniture, utilities, operational supplies and expenses and others. breakdown of the objects of expense that comprise operating expenditures and thei values for 1977-78 to 1982-83 is found in Table 17 of the Appendix. Figure 1 illustrates graphically the proportion of real operating expenditures accounted for b salary-related and non-salary expenses during this period.

i) Salary-Related Expenditures

The majority of university operating expenses is in salaries, wages and benefits o faculty and staff. The proportion of operating expenditures accounted for by this are declined slightly from 80.6% in 1977-78 to 79.8% in 1982-83. During this period expenditures increased by 61.1% from $699.8 million to $1,059.3 million, a rea decline of 6.8%.

Figure 17 provides a breakdown of the share of Ontario universities' salary related expenditures accounted for by each salary-related object of expense. Of the total operating fund salary-related expenditures, faculty and staff benefits account fo only a small portion. In 1982-83, about $116 million of the more than $1,059 million i operating fund salaries, wages and benefits expenditures was spent on employee benefits. The remainder of these expenditures went towards the costs of faculty an staff salaries and wages.

Faculty Salaries and Complement

The largest share of operating fund salaries and wages expenditures is spent o faculty salaries.[18] The proportion of total operating fund salaries and wages accounte for by faculty salaries increased from 54.1% in 1977-78 to 55.2% in 1982-83. Total university operating expenditures on faculty salaries increased during this period by 53.1% from $340 million to $521 million. Over the same period, mean salaries for full-time faculty at Ontario universities rose by 57.4% from $28,197 to $44,388, while CPI increased by 62.4%. Thus, faculty salaries have fallen in real terms since 1977-78.

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[18] Faculty salaries include the salaries of any full-time or part-time university staff members who hold academic rank in institutions, from lecturers to deans inclusive. The salaries and benefits of these staff members are found in the instruction and (non-sponsored) research functional area of the operating fund.

Data from COU found in Table 18 of the Appendix show that from 1977-78 to 1979-80 the number of faculty in Ontario universities declined by 1.7%. Since then, the faculty complement has increased to the point where in 1982-83 there were 13,268.9 FTE faculty members, two more than found in 1977-78. During the period 1977-78 to 1982-83, full-time tenure stream positions increased by 259 or 2.6%, while full-time limited term positions declined by 120 or 7.3%, and FTE part-time faculty declined by 137 or 7.5%. There has been a shift in the proportion of faculty complement represented by tenured faculty, increasing from 73.9% to 75.9% over this period.

During this period, student/faculty ratios increased. In 1977-78, there were 14.4 FTE students per FTE faculty member in the province. By 1982-83, there were 15.9 FTE students per FTE faculty member - a 10.4% increase in this ratio.

Non-Faculty Salaries and Complement

Council has observed in previous financial papers that the salaries of non-faculty staff have, in real terms,declined more than faculty salaries. Unfortunately, unlike that for academic staff, Council does not have complete information on salary levels and complements for these university employees for the entire 1977-78 to 1982-83 period. Complete data for non-faculty staff are, however, available for the most recent three years - 1980-81 to 1982-83. During that period, mean non-academic staff salaries and wages increased by 26.9% from $16,544 to $20,989. During the same period mean faculty salaries increased by 26.3% while CPI increased by 22.6%. From 1980-81 to 1982-83, the number of FTE non-academic staff declined by 7.7%, while the number of faculty increased by 1.6%.

COFO-UO divides the salaries of non-faculty staff into two categories:(i) other instruction and research, and (ii) other salaries and wages. The other instruction and research category refers to staff members without academic rank:

> . . . who are engaged in instruction and research as instructors, tutors, markers, demonstrators, teaching assistants, research assistants, investigators, clinical assistants, post-doctoral fellows, and others . . .[19]

From 1977-78 to 1982-83, the share of total operating fund salaries and wages represented by other instruction and research declined from 6.1% to 5.8%. During this period, salary expenditures for other instruction and research employees increased 42.1% and declined in real terms by 12.5%.

The salaries, wages and payments of non-instructional staff are found under "other salaries and wages". This includes the salaries of technicians, clerks, secretaries, professional and management employees, janitors, tradesmen and maintenance workers. These activities are found in all functional areas of the operating fund. The proportion of total operating fund salaries accounted for by this category of non-faculty staff has also declined slightly since 1977-78 from 39.8% to 39.0% in 1982-83. During this period, salary expenditures for non-instructional staff increased by 46.8% in current dollars and averaged 9.7% below the 1977-78 level in real terms.

There have been some significant shifts in expenditures on non-instructional salaries among functional areas of the operating fund since 1977-78. The most significant changes have occurred in the instruction and non-sponsored research, the

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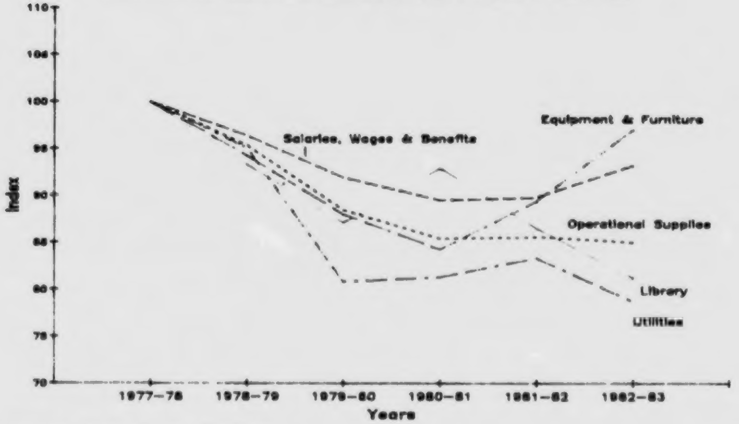
[19] Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities: 1982-83*, Volume 1, p. 10. The salaries, wages and benefits of these staff members are found only in the instruction and (non-sponsored) research functional area of the operating fund.

FIGURE 18

Indexes of Real Operating Expenditures by Major Object of Expense: 1977–78 to 1982–83 (Constant 1977–78 Dollars, 1977–78 = 100.0)



Source: Table 17 of Appendix.

physical plant and student services functional areas. The proportion of non-instructional salary expenditures devoted to supporting instruction and non-sponsored research increased from 32.8% in 1977-78 to 35.3% in 1982-83. On the other hand, the proportions of non-instructional salary expenditures spent on physical plant salaries declined from 21.9% to 19.5% and those spent on student services declined from 6.3% to 5.7%.

ii) Non-Salary Expenditures

In 1977-78, Ontario universities expended $168.6 million or 19.4% of total operating expenditures on non-salary items. By 1982-83 these expenditures had risen by 59.0% to $268.0 million and represented 20.2% of total operating expenditures. However, this increase in the proportion of total operating expenditures for non-salary items may be misleading. During this period, the prices of non-salary items as measured by OUNSPI increased by 74.1%, while salary-related costs as measured by CPI increased by only 62.4%. Whereas salary expenditures declined by 7.7% in real terms from 1977-78 to 1982-83, non-salary items declined almost equally by 7.4%. Figure 18 provides indexes of real changes in expenditures on the major objects of expense for the years 1977-78 to 1982-83.

Table 17 of the Appendix provides a breakdown of the types of non-salary expenditures incurred by universities for the years 1977-78 to 1982-83. Figure 19 displays the share of non-salary operating expenditure accounted for by the major non-salary objects of expense in 1982-83.

Operational Supplies and Expenses

The largest non-salary expenditure category is operational supplies and expenses. It includes, among other things, postage, duplication, publication, telephone charges, repair materials and office supplies. Expenditures in this area have increased by only 45.7% since 1977-78 (a real decline of 15.1%), resulting in a decline in share of non-salary operating expenditures from 30.2% in 1977-78 to 27.6% in 1982-83.[20]

Utilities

Ontario universities' expenditures on fuel, electricity, water, gas and telephone equipment rental and installation increased by 40.2% from 1977-78 to 1982-83. The share of non-salary operating expenditures spent on these utilities declined from 20.6% to 18.2%. The universities have effected considerable savings in this area of operation. Utility costs have increased by 40.2% during this period, implying a reduction in real utility expenditures of 21.3%.

Equipment and Furniture Expenditure

The equipment and furniture category of expenditures includes expenses for laboratory equipment, administrative equipment and furnishings, copying and duplicating equipment, computing equipment, maintenance equipment and furniture.[21] It is evident from Figure 18 that the real value of equipment and furniture purchase and rental expenditures has declined substantially in recent years. During the period 1978-79 to 1982-83 real expenditures on equipment and furniture purchases and rentals averaged 9.5% less than in 1977-78. By 1982-83, however, real equipment and furniture purchases were 6.4% greater than in 1977-78.

Equipment and furniture purchase and rental expenditures' share of non-salary operating expenditures increased from 14.7% in 1977-78 to 14.8% in 1982-83. In 1982-83, 46.5% of equipment and furniture expenditures were spent in the instruction and (non-sponsored) research functional area, and 36.8% were accounted for by central computing. During the period 1977-78 to 1982-83 the proportion of these expenditures in central computing, library and physical plant functional areas declined, while the proportion spent in the remaining functional areas increased (particularly administration).

Library Acquisitions

The total value of Ontario universities' expenditures on purchases of books, periodicals, microfilms, microfiche and other reference materials for their main, branch and faculty or departmental libraries declined by 18.8% in constant dollars during the period 1977-78 to 1982-83 as illustrated in Figure 18. The share of total non-salary operating expenditures devoted to library acquisition increased slightly from 10.4% in 1977-78 to 10.5% in 1982-83.[22]

As Council has noted in the past, the severity of the decline in library acquisitions can be attributed not only to the pressures of general financial constraints, but also to extraordinary increases in the prices of books and periodicals. As shown in Table 17 of the Appendix, library acquisition expenditures increased by about 61.1% from 1977-78 to 1982-83. At the same time, the prices of monographs and periodicals increased by about 85% and 112%, respectively.

Other Non-Salary Expenditures

The remaining objects of operating expense and their values for the years 1977-78 to 1982-83 are found in Table 17 of the Appendix. "Other expenditures" on renovations, alterations and major repairs; externally contracted services; scholarships and bursaries; taxes; principal and interest repayments; land and site services; buildings;

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[20] Prior to 1980-81, equipment and furniture maintenance was not reported as a separate category of expenditure by COFO-UO. A large portion of these expenditures was reported under operational supplies and expenses. To ensure reasonably consistent inter-year comparisons, expenditures or maintenance of equipment and furniture for the years 1980-81 to 1982-83 are included in underlying operational supplies and expenses figures used in these calculations.

[21] Over 80% of expenditures on equipment and furniture are devoted to equipment expenditures, including computer costs.

[22] The price deflator used to calculate constant dollar values for 1978-79 to 1982-83 was the books and periodicals component of OUNSPI.

miscellaneous; and internal cost allocations have increased by 90.8% since 1977-78 to $77.6 million.

The largest objects of expense in recent years have been miscellaneous expenditures ($29.2 million in 1982-83), externally contracted services ($16.9 million in 1982-83), renovations, alterations and major repairs ($15.1 million in 1982-83), and scholarships and bursaries ($12.0 million in 1982-83). Expenditures on these objects of expense increased by 41.1%, 41.6%, 56.5% and 108.6% respectively since 1977-78. The remaining objects of expense - taxes, principal and interest repayment, land and site services, building and internal cost allocations - also increased considerably to $4.6 million in 1982-83.

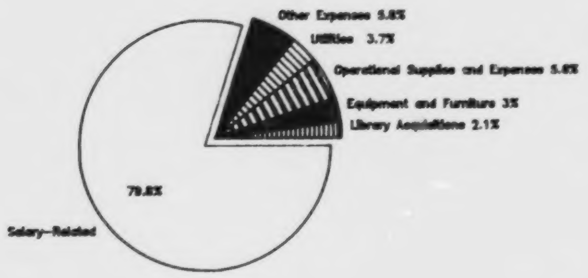
B.2 (c) Summary of Operating Expenditures

Since 1977-78, Ontario universities have responded to the constraints placed on their operating revenue by constraining their operating expenditures. At the same time, however, demands placed on these institutions have increased. This is particularly evident in the area of academic instruction where enrolments have fluctuated, declining slightly and, in recent years, increasing to record levels. On the other hand, faculty numbers generally remained stable. Student/faculty ratios have increased by over 10% since 1977-78 while academic expenditures per FTE student have declined by over 15% in constant 1977-78 dollars.

As the analysis above indicates there has been very little shift in the proportion of operating expenditures going toward each university functional area in response to the income constraints experienced in recent years. Institutions have constrained expenditures relatively consistently across the board as opposed to selective cuts in areas of low priority and enhancements of areas of high priority. This may not be surprising given that one functional area, instruction and non-sponsored research, accounts for almost 65% of operating expenditures and encompasses a broad range of university activity. The financial information available to Council does not, for

FIGURE 19

Non-Salary Expenditures by Object of Expense as a Proportion of Total Operating Expenditures: 1982-83



Source: Table 17 of Appendix.

example, allow for an analysis of the shifts in resources that have taken place at the faculty and department level to accommodate shifts in student preferences. Despite some shortcomings in the information available, it is evident that some key university functions have suffered more severe declines in real expenditures than most. However, the differences are not great. In particular, expenditures on the functional areas of academic computing, library, physical plant and student services declined in real terms by a greater rate than did the other functional areas.

Similarly, of the major objects of expense, library acquisitions, operational supplies and expenses, utilities, and the two non-faculty salary categories of other instruction and research and other salaries and wages declined more severely than did other objects of expense. The functional areas mentioned accounted for 26.4% of total operating expenditures in 1982-83 while the objects of expense accounted for 43.2% of total operating expenditures in the same year. To a lesser extent the remaining functional areas also experienced decines in real expenditures. From the data available, it appears that the shifting of resources into priority areas has been limited and, for the most part, where shifts have occurred they have not been dramatic.

The impact of the combination of across the board reductions in real expenditures of about 7% and an increase in FTE enrolment of over 10% is difficult to quantify and to put into perspective. This combination results in a significant decline in expenditures per student in student-related academic and non-academic functional areas such as academic computing instruction and non-sponsored research, library and student services. At the same time, faculty numbers remained relatively unchanged while non-faculty staff complements were reduced. Given these considerations, Council concludes that the "inputs" into students' university experience have been diminished. To what extent is uncertain.

(C) THE CAPITAL FUND

The capital fund of Ontario universities reflects the revenue available and funds expended for capital purposes, including the costs of major renovations, alterations and repairs along with new construction. In 1982-83, about 2.2% of total university system revenue and 2.4% of total university system expenditures were accounted for by the capital fund. As Tables 1 and 2 of the Appendix indicate, the proportions of total resources available and expended have declined sharply since 1977-78 when they stood at 3.7% of total revenue and 4.3% of total expenditures while the demands placed on the physical plant and other capital resources of the universities have increased.

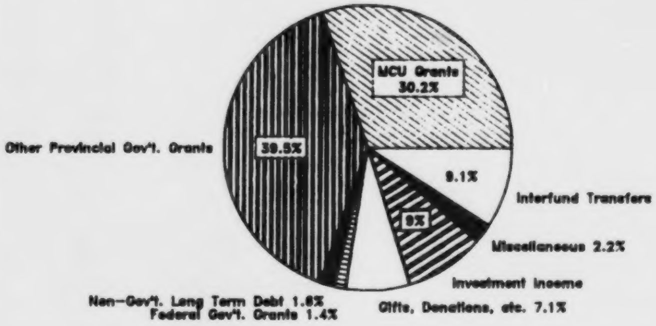
C.1 CAPITAL INCOME

Since 1977-78, Ontario universities' capital income has declined by 3.9% in current dollars and by 38.8% in constant 1977-78 dollars. The resource constraints on capital activity have been more severe than the activities found in any other university fund. In fact, this is the only fund to experience a decline in current dollar revenue since 1977-78.

The universities have very little flexibility in the use of the majority of their capital income. Provincial Government capital grants are generally allocated on a project by project basis according to set criteria. MCU capital grants are allocated according to Ministerial discretion after project review. The capital projects submitted by universities are assessed individually according to the conditions, guidelines and criteria set out by Council in Advisory Memorandum 76-VIII. The flow of funds for these projects is controlled by the Ministry as the projects progress.

Other Provincial Government capital grants are also tightly controlled. For example, the procedures for capital grants from the Board of Industrial Leadership and Development (BILD) follow closely those set out for the Ministry of Colleges and Universities. The criteria for grant eligibility and priorities differ from the MCU grants, but these grants are administered by MCU officials for BILD.

FIGURE 20
Proportion of Capital Income by Source:
1982-83



Source: Table 19 of Appendix.

Table 19 of the Appendix provides a breakdown of the total capital income of the universities for the period 1977-78 to 1982-83. Non-Provincial Government sources of capital income declined by 12.8% during the period 1977-78 to 1982-83. On the other hand, Provincial Government capital funding remained relatively unchanged, increasing by 0.5% during this period. Clearly, unlike other areas of university activity, provincial capital grants are becoming increasingly important for the funding of capital projects. Figure 20 displays the proportion of capital income accounted for by various sources in 1982-83.

C.1(a) Capital Grants

The capital investment by the Government of Ontario in land, building and other physical assets of the Ontario university system is shown in Table 20 of the Appendix. Of the more than one billion dollars Government has invested in the system through capital grants and debentures since 1944, over 80% occurred between 1964-65 and 1973-74. Since that time there has been little or no capital expansion and capital funding for repairs, renovations and replacement projects has been increasingly restricted.[23]

Ontario universities received MCU capital grant allocations of $15.2 million, $13.5 million, $13.5 million, $13.5 million, $14.3 million and $12.2 million in each of the last six years (1978-79 to 1983-84). It is apparent from both Tables 19 and 20 of the Appendix that there is an increasing tendency by Government to provide capital projects' grants outside the normal MCU capital grants process. These grants are

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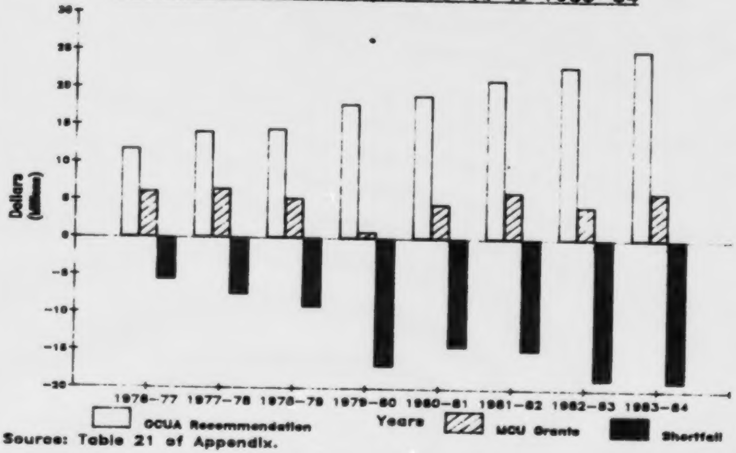
[23] The difference in capital grant figures found in Tables 20 and 21 of the Appendix from those found in Table 19 of the Appendix can be attributed to the use of two different sources of data. The data found in Tables 20 and 21 of the Appendix are from the Ministry of Colleges and Universities while the data found in Table 19 are from COFO-UO reports. The differences in the figures listed are a consequence of: the difference in fiscal years for Government and the universities and differences in defining capital activity used by Government and universities which results in MCU "capital grants" being reported outside of the capital fund and other grants being reported in the capital fund.

FIGURE 21

OCUA Capital Funding Recommendations for Major Repair, Renovations and Replacement Projects, Government Grants, and Shortfall in Funding: 1976–77 to 1983–84



Source: Table 21 of Appendix.

awarded according to criteria different from the MCU capital grants and in many instances have a different purpose. In 1982-83, for example, an additional $10.0 million was made available for repairs to university buildings through the BILD Summer and Winter job creation programs. In 1983-84, a further $7.4 million was made available as a special capital works acceleration program coordinated by BILD. This job initiative "is targetted primarily to regions of the province with higher levels of unemployment" and will provide $18.6 million to the universities over two years.[24]

Table 21 of the Appendix shows Council's advice on the capital requirements of the universities and the actual grants made available since 1976-77. Council has consistently recommended to Government that, to maintain Ontario's substantial capital investment in the university system, 1% of the replacement value of the space inventory of the universities be provided annually for new major repairs, renovations and replacement projects (excluding any amounts necessitated by carry-overs).[25] Table 21 indicates that Government funding for this purpose has fallen well short of Council's recommendations. Figure 21 displays graphically this shortfall in capital funding for the years 1976-77 to 1983-84. For 1983-84, Council recommended that $25.3 million be provided, but only $6.4 million has been made available. Even when the $7.4 million from the BILD program is taken into account, Government support for the maintenance of capital investment fell $11.5 million short of Council's recommendations for 1983-84.

As mentioned above, Council's capital funding recommendations pertain to new major repairs, renovations and replacement projects. However, in recent years, as shown in Table 21 of the Appendix, the majority of Government capital support has been directed towards the continued funding (carry-over) of existing major repairs, renovations and replacement projects and carry-over costs of projects involving the construction of additional space. The funding, even for these projects, has been restricted severely in recent years.

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[24] *1983 Ontario Budget*, May 10, 1983, p. 10.

[25] See Advisory Memorandum 77-IV for further information on Council's capital recommendation.

C.1 (b) Other Capital Income

Capital income from sources other than Provincial Government grants accounted for 30.4% of total capital income in 1982-83. As Table 19 of the Appendix indicates, income from non-government borrowing, Federal Government grants and contracts, fees, gifts, donations and non-government grants, investment income, miscellaneous income, and interfund transfers declined by 12.8% from 1977-78 to 1982-83.

A substantial portion of this reduction came from reduced borrowings by the universities, dropping from $6.1 million in 1977-78 to $0.7 million in 1982-83. Income from gifts, donations and non-government grants, investment income and miscellaneous sources fluctuated throughout this period. At the end of this period, revenue was less than at the beginning of the period for gifts, donations and non-government grants (-3.4%) and miscellaneous income (-10.0%). On the other hand, in 1982-83 investment income was 20.4% higher than in 1977-78. Income from these four sources in 1982-83 was one third less than the income from these sources in 1977-78.

Given the constraints on the traditional sources of Governmental and non-Governmental sources of capital it is not surprising to see a steady rise in interfund transfers from other funds into the capital fund during the period 1977-78 to 1982-83. During this period interfund transfers increased by 204.1% and the share of total capital funding increased from 2.9% to 9.1%. Thus the universities have been augmenting their capital income with revenues from other funds.

C.2 CAPITAL EXPENDITURES

Total Ontario universities' capital expenditures declined by 9.4% from 1977-78 to 1982-83. As illustrated in Table 22 of the Appendix, during this period, there were major shifts in expenditures within the capital fund.

The majority of capital expenditures is spent on building construction costs. This object of expense includes the direct building construction costs as well as the planning costs associated with such construction and any costs incurred during construction such as utilities. Expenditures on building construction declined by 36.2% from $36.8 million in 1977-78 to $23.4 million in 1982-83. During this period the proportion of total capital resources spent on building construction declined from 73.2% in 1977-78 to 51.6% in 1982-83.

The major increases in capital expenditures that occurred during the period 1977-78 to 1982-83 were in renovations, alterations and major repairs, and equipment and furniture purchases. Expenditures on major renovations, alterations and repairs increased by 121.7% and the share of total capital expenditures increased from 12.8% to 31.3% during this period. Equipment and furniture expenditures increased by 59.7% and the share of capital expenditures increased from 8.0% to 14.2%.

(D) THE SPONSORED RESEARCH FUND

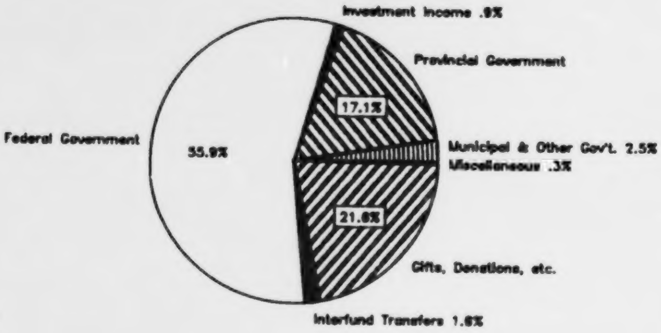
The sponsored research fund of Ontario universities accounts for government and private sources of external grant support specifically available for and expended on research activities and projects. In 1982-83, about 14.1% of total university system revenue and 14.4% of total university system expenditures were accounted for by the sponsored research fund. As Tables 1 and 2 of the Appendix indicate, these proportions of total resources available and expended increased significantly since 1977-78 when they stood at 10.9% of total revenue and 10.8% of total expenditures.

D.1 SPONSORED RESEARCH INCOME

Figure 22 displays the proportion of total sponsored research income accounted for by major sources of income. As can be seen by this figure, most of the universities' sponsored research revenue comes from Government sources. These include: i) the federal granting agencies - Natural Sciences and Engineering Research Council (NSERC), the Medical Research Council (MRC) and the Social Sciences and

FIGURE 22

Proportion of Sponsored Research Income by Source: 1982-83



Source: Table 23 of Appendix.

Humanities Research Council (SSHRC); ii) contracts with various departments of the federal government; and iii) contracts with ministries in the provincial government. Table 23 of the Appendix outlines the sources of sponsored research funding received in the years 1977-78 to 1982-83. Total sponsored research has increased by 114.2% over this period, with the share of Federal Government sponsored research decreasing from 58.8% to 55.9% and the Government of Ontario's share decreasing from 18.2% to 17.1%. Interestingly, the share of total sponsored research funding from non-government grants, gifts and donations increased from 16.7% in 1977-78 to 21.6% in 1982-83.

The funding of sponsored research in the universities from NSERC, MRC and SSHRC improved slightly in 1983-84. However, in order for the Federal Government's Research and Development (R and D) expenditure target of 1.5% of Gross National Product by 1985 to be realized, university R and D expenditures must increase annually by 9%.[26]

D.2 SPONSORED RESEARCH EXPENDITURES

Total Ontario universities' sponsored research expenditures increased by 34.5% in real terms from 1977-78 to 1982-83. Table 24 of the Appendix outlines the universities' sponsored research expenditures by object of expense for the years 1977-78 to 1982-83. As can be seen from Figure 23, the majority of sponsored research expenditures goes toward salary-related expenditures. However, the share of total sponsored research expenditures associated with salary-related expenditures declined from 59.2% in 1977-78 to 55.1% in 1982-83. On the other hand the share of sponsored research expenditures accounted for by equipment and furniture purchases doubled during this period from 7.7% to 15.3%.

Research was one of the main topics of discussion at Council's 1983 Spring hearings. Council was impressed with the effort and the accomplishments of Ontario

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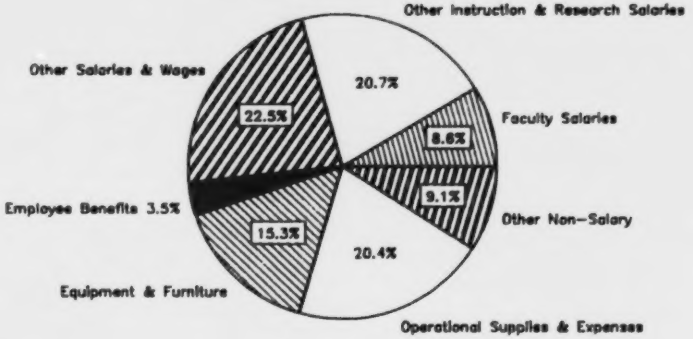
[26] Ministry of State for Science and Technology - Canada, *The Government of Canada's Investment in Science*, 1982, p. 8.

FIGURE 23

Proportion of Sponsored Research Expenditures
by Object of Expense: 1982-83



Source: Table 24 of Appendix.

universities in this vital area of university endeavor. A major concern of the institutions was the high overhead or indirect costs of carrying out sponsored research. The residual direct costs and the indirect costs of sponsored research, including such costs as library, computer, administrative and physical plant resources, and technical support staff, have had to be covered by operating grants provided by the provincial Government. It is difficult to determine from COFO-UO information the size of overhead charges made by the universities. Such overheads can be included under the specific object of expense or they may be included under internal cost recoveries. The recently released study by the Canadian Association of University Business Officers (CAUBO), indicates that the overhead or indirect costs of research activity amount to an additional 50% of the direct cost of research when space and capital costs are excluded, and almost 80% of direct cost if capital replacement costs are included.[27]

In reference to problems of indirect costs of research, the University of Waterloo concluded its 1983 brief to Council with the statement that: "... the continued erosion of base funding to subsidize research costs is detrimental to the institution, students, faculty and staff and, ultimately, to the research itself".[28] The University of Guelph concluded in its brief to Council that:

> Faced with this situation, the university has only three choices: first to curtail research, second to sacrifice the teaching programs, many of which are already underfunded, or third, to somehow recoup from the granting agencies a greater share of research overhead.[29]

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27. Canadian Association of University Business Officers, *Report of the Study on the Costs of University Research*, 1982, p. 16.
28. University of Waterloo, *Brief to Ontario Council on University Affairs*, April 7, 1983, p. 6.
29. University of Guelph, *Material for the Ontario Council on University Affairs Hearing with the University of Guelph*, 1983, p. 12.

Conclusion

Council has stated on a number of occasions that it believes that the Ontario university system has received an inadequate level of income since 1977-78. During the period 1978-79 to 1982-83, total university revenue averaged 3.9% below the 1977-78 level in constant 1977-78 dollars, while FTE enrolment averaged 2.1% above the 1977-78 level. This disparity has grown to the point where, in 1982-83 enrolment was 10.7% above the 1977-78 level compared with real income 1.1% higher than in 1977-78. Cumulatively, the universities have absorbed a $255 million reduction in real income (1977-78 dollars) and a $267 million reduction in real expenditures over the period 1977-78 to 1982-83. Real income has declined most severely in the operating fund and capital fund, both of which receive the majority of their income from Government.

As a result of the preceding analysis and past study, Council concludes that restrictions on Government funding since 1977-78 have been the main cause of the growing disparity between the level of service demanded of the universities of Ontario and the level of income available to carry out the universities' responsibilities. The share of total income from provincial sources has dropped from 63.5% in 1977-78 to 58.0% in 1982-83. Government operating grants and capital grants averaged 9.9% and 36.5% below their respective 1977-78 levels in real terms. In comparison with universities in other provincial jurisdictions, by 1981-82 Ontario universities received the lowest level of operating grants per FTE student and the second lowest level of operating income per FTE student in the country.

While revenue supporting operating fund activities remains heavily dependent on Government grants, the burden of support of operating fund activities has shifted somewhat to other sources of revenue such as student fees. There are, however, limits to the flexibility universities have in increasing revenue for operating fund activities such as credit instruction and non-sponsored research. Those constraints are the result of restrictions placed on the use of various sources of income by Government (student tuition fees), private donors and practical limits on the ability of universities to substantially increase revenue from non-Government sources. While other sources of operating income have become more important in recent years it is unrealistic to expect that the deficiencies in the level of Government grants can be overcome by increasing revenue from other sources. In particular, Council feels strongly that the universities should not be expected to increase their flexibility in interfund transfers from the trust and endowment fund to the operating fund for use on general operating expenditures. Such behaviour may reduce donor receptiveness to future fund-raising campaigns.

In examining the flexibility universities have in using existing sources of funding, Council found the limits on the flexibility in expending most major sources of income within each fund varied from fund to fund. In the operating fund, over 90% of the universities' income is determined by Government. However, for the vast majority of this funding, the limitations on use are minimal. This is not the case for capital funding. Virtually all Government-generated funding is tightly controlled on a project-by-project basis.

The universities have responded to funding constraints by constraining expenditures relatively consistently across the board as opposed to selective cuts in areas of low priority and enhancements of areas of high priority. There has been very little shift in the proportion of operating expenditures going toward each functional area or object of expense. There have been some exceptions which, while not dramatic, should be noted. Real operating expenditures on academic computing, library, physical plant and student service functional areas of the operating fund have declined at a greater rate than those in other functional areas. Similarly, real expenditures on library acquisitions, operational supplies and expenses, utilities and non-faculty salaries and wages have declined by a greater margin than other objects of expense.

While unable to measure the effect of restricted funding on the quality of the "outputs" of Ontario universities (educated graduates and scholarly research), Council's analysis sheds some light on what has happened to the "inputs" of the university enterprise. Coinciding with the reductions in real operating expenditures mentioned above has been an increase in student/faculty ratios of over 10%. When measured in constant dollars, there have also been significant reductions in student-related expenditures per student; i.e., library, academic computing, student services, and instruction and non-sponsored research. In addition, the physical plant continues to deteriorate as: demands placed on it increase to record levels; support staff levels decline as demands for their services increase; equipment renewals are delayed as the need for up-to-date equipment for teaching and research becomes more critical; and the ability to cover overhead costs of sponsored research diminishes, placing future research projects in jeopardy. Council, therefore, concludes that there has been a reduction in the quality of the "inputs" into a university education in recent years. The impact of this on the "outputs" remains uncertain. These problems must be addressed by both Government and the universities with an eye to reversing the trend and identifying those areas of university activities that must be given priority in the future.

Appendices

Table 1

Total University System Revenue and Type of Fund: 1977-78 To 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	$	% Share					$	% Share	
General Funds:									
Operating (1)	859,819	73.5	904,581	955,316	1,043,126	1,169,112	1,343,563	69.1	56.3
Other (Non-credit) (1)	9,869	0.8	10,822	14,091	15,085	16,625	25,854	1.3	162.0
Ancillary Enterprises	95,785	8.2	101,221	114,494	127,044	137,895	193,929	10.0	102.5
Restricted Funds:									
Sponsored Research (1)	128,049	10.9	144,439	168,528	195,790	251,246	274,338	14.1	114.2
Trust and Endowment (1)	32,488	2.8	39,549	40,179	53,394	59,115	63,763	3.3	96.3
Capital (1)	43,530	3.7	28,820	25,876	41,930	44,731	41,818	2.2	-3.9
TOTAL (1)	1,169,540	100.0	1,229,432	1,318,484	1,476,369	1,678,724	1,943,265	100.0	66.2

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(1) 1977-78 to 1979-80 figures exclude sales of services and products. This adjustment was made to ensure consistency with remaining years when sales of services and products were netted against expenses.

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1

Table 2

Total University System Expenditures and Type of Fund: 1977-78 To 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	$	% Share					$	% Share	
General Funds:									
Operating (1)	855,041	73.7	895,131	948,064	1,044,139	1,173,198	1,327,385	68.9	55.2
Other (Non-credit) (1)	9,750	0.8	11,046	14,471	15,206	17,341	26,114	1.4	167.8
Ancillary Enterprises	95,750	8.3	100,454	115,002	126,467	137,216	194,805	10.1	103.5
Restricted Funds:									
Sponsored Research (1)	125,328	10.8	144,213	161,897	186,985	229,648	277,739	14.4	121.6
Trust and Endowment (1)	24,731	2.1	24,258	28,552	37,579	42,421	55,274	2.9	123.5
Capital (1)	49,808	4.3	34,310	27,319	51,721	40,934	45,481	2.4	−8.7
TOTAL (1)	1,160,408	100.0	1,209,412	1,295,305	1,462,097	1,640,758	1,926,798	100.0	66.0

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(1) Adjusted to net out equivalent of sales of services and products for years 1977-78 to 1979-80 in order to ensure consistency with remaining years.

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Table 3

Revenue, Expenditures and Changes in Fund Balances for 1982-83

($000)

	General Funds					Restricted Funds			
	Operating		Other (non-credit)	Ancillary Enterprises		Sponsored Research	Trust and Endowment	Capital	Total
	Unappropriated	Appropriated		Unappropriated	Appropriated				
Total Revenue	1,343,563		25,854	193,929		274,338	63,763	41,818	1,943,265
Total Expenditures	1,327,385		26,114	194,805		277,739	55,274	45,481	1,926,798
Net Revenue (Expense)	16,178		−260	−876		−3,401	8,489	−3,663	16,467
Variation in Appropriations	−13,233	13,187		−760	806				
Other Transfers	−1,448	−63	433	332		17	−642	1,371	
Increase (Decrease) for the Year	1,497	13,124	173	−1,304	806	−3,384	7,847	−2,292	16,467
Balance – Beginning of Year	−4,721	45,882	1,005	866	6,107	90,113	136,432	25,377	301,061
Balance – End of Year	−3,224	59,006	1,178	−438	6,913	86,729	144,279	23,085	317,528

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers — Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Table 4

Total University System Other (Non-Credit) Income: 1977-78 To 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	$	% Share					$	% Share	
1. ONTARIO GOVERNMENT GRANTS AND CONTRACTS									
(i) MCU Grants	732	7.4	790	914	821	925	1,056	4.1	44.3
(ii) Other	2,651	26.9	2,918	3,516	3,626	4,536	5,489	21.1	107.1
TOTAL ONTARIO GRANTS	3,383	34.3	3,708	4,430	4,447	5,461	6,545	25.3	93.5
2. FEES									
(i) Tuition Non-Credit	6,254	63.4	7,115	8,825	9,306	10,341	15,251	59.0	143.9
(ii) Miscellaneous	192	1.9	240	239	266	195	2,118	8.2	1,003.1
TOTAL FEES	6,446	65.3	7,355	9,064	9,572	10,536	17,369	67.2	169.5
3. OTHER INCOME									
(i) Government Grants and Contracts									
(a) Federal		0.0	5	406	245	336	888	3.4	
(b) Other		0.0						0.0	
(ii) Gifts, Donations and Non-Government Grants		0.0	10	475	570	449	466	1.8	
(iii) Investment Income		0.0		5	3	109	240	0.9	
(iv) Miscellaneous	40	0.4	42	63	59	36	282	1.1	605.0
(v) Interfund Transfers		0.0	(298)	(352)	189	(302)	64	0.2	
TOTAL OTHER INCOME	40	0.4	(241)	597	1,066	628	1,940	7.5	4,750.0
TOTAL OPERATING INCOME (1)	9,869	100.0	10,822	14,091	15,085	16,625	25,854	100.0	162.0
UNADJUSTED TOTAL OPERATING INCOME	10,270		10,979	14,377	15,085	16,625	25,854		151.7

(1) Adjusted for change in definition of other (non-credit) revenue in 1980-81, when sales of services and products were netted against expenses.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities* Vol. 1.

NOTE: Excludes affiliated colleges.

Table 5

Total University System Other (Non-Credit) Expenditures by Object of Expenses: 1977-78 to 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	$	% Share					$	% Share	
1. SALARIES AND WAGES									
(i) Faculty (Academic Ranks)	2,701	26.6	2,813	3,918	3,806	4,268	4,755	18.2	76.0
(ii) Other Instruction and Research	1,561	15.4	1,743	1,868	1,938	2,787	2,968	11.4	90.1
(iii) Other Salaries and Wages	2,127	21.0	2,588	3,892	4,024	4,124	10,078	38.6	373.8
TOTAL SALARIES AND WAGES	6,389	62.9	7,144	9,678	9,768	11,179	17,801	68.2	178.6
2. EMPLOYEE BENEFITS	541	5.3	504	629	701	851	1,771	6.8	227.4
TOTAL SALARIES AND BENEFITS	6,930	68.3	7,648	10,307	10,469	12,030	19,572	74.9	182.4
3. LIBRARY ACQUISITIONS	0	0.0	0	17	6	4	2	0.0	
4. EQUIPMENT AND FURNITURE									
(i) Purchase	91	0.9	53	144	187	212	295	1.1	224.2
(ii) Rental	25	0.2	29	43	44	39	52	0.2	108.0
TOTAL EQUIPMENT AND FURNITURE	116	1.1	82	187	231	251	347	1.3	199.1
5. OPERATIONAL SUPPLIES AND EXPENSES (1)	1,561	15.4	1,698	2,740	2,889	2,802	3,885	14.9	148.9
6. UTILITIES	0	0.0	0	119	141	218	338	1.3	
7. EXTERNALLY CONTRACTED SERVICES	0	0.0	0	30	6	11	17	0.1	
8. MISCELLANEOUS	649	6.4	822	1,317	1,342	1,776	1,623	6.2	150.1
9. INTERNAL COST ALLOCATIONS	895	8.8	953	40	122	249	330	1.3	−63.1
TOTAL	10,151	100.0	11,203	14,757	15,206	17,341	26,114	100.0	157.3
ADJUSTED TOTAL (2)	9,750		11,046	14,471	15,206	17,341	26,114		167.8

(1) Includes equipment and furniture maintenance.

(2) Adjusted for change in treatment of sales of services and products by netting out an equivalent level of expenditures from total other (non-credit) expenditures in 1977-78 to 1980-81.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1

NOTE: Excludes affiliated colleges

Table 6

Total University System Ancillary Enterprises Income: 1977-78 to 1982-83
($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	$	% Share					$	% Share	
1. ONTARIO GOVERNMENT GRANTS AND CONTRACTS									
(i) MCU Grants		0.0				50	34	0.0	
(ii) Other	23	0.0	48	70	82	91	91	0.0	295.7
TOTAL ONTARIO GRANTS	23	0.0	48	70	82	141	125	0.1	443.5
2. MISCELLANEOUS FEES	37,922	39.6	40,526	43,824	46,401	51,393	56,586	29.2	49.2
3. OTHER INCOME									
(i) Federal Government Grants and Contracts		0.0				20	153	0.1	
(ii) Gifts, Donations, and Non-Government Grants	29	0.0	7	6	6	6	105	0.1	262.1
(iii) Sales of Services and Products	57,445	60.0	59,585	70,528	80,339	85,842	136,887	70.6	138.3
(iv) Investment Income		0.0	7	269	309	341	607	0.3	
(v) Miscellaneous	467	0.5	1,180	275	251	504	638	0.3	36.6
(vi) Interfund Transfers	(101)	−0.1	(132)	(478)	(344)	(352)	(1,172)	−0.6	1,060.4
TOTAL OTHER INCOME	57,840	60.4	60,647	70,600	80,561	86,361	137,218	70.8	137.2
TOTAL OPERATING INCOME	95,785	100.0	101,221	114,494	127,044	137,895	193,929	100.0	102.5

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Table 7

Total University System Ancillary Expenditures by Object of Expense: 1977-78 to 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	$	% Share					$	% Share	
1. SALARIES AND WAGES									
(i) Faculty (Academic Ranks)	0	0.0	0	0	0	0	0	0.0	
(ii) Other Instruction and Research	0	0.0	0	0	0	0	0	0.0	
(iii) Other Salaries and Wages	24,517	25.6	24,795	30,586	34,835	35,201	54,105	27.8	120.7
TOTAL SALARIES AND WAGES	24,517	25.6	24,795	30,586	34,835	35,201	54,105	27.8	120.7
2. EMPLOYEE BENEFITS	2,168	2.3	2,327	2,649	3,155	3,343	5,187	2.7	139.3
TOTAL SALARIES AND BENEFITS	26,685	27.9	27,122	33,235	37,990	38,544	59,292	30.4	122.2
3. EQUIPMENT AND FURNITURE									
(i) Purchase	1,104	1.2	1,551	1,381	1,651	2,082	2,539	1.3	130.0
(ii) Rental	221	0.2	189	1,406	2,072	378	588	0.3	166.1
TOTAL EQUIPMENT AND FURNITURE	1,325	1.4	1,740	2,787	3,723	2,460	3,127	1.6	136.0
4. OPERATIONAL SUPPLIES AND EXPENSES (1)	8,725	9.1	8,602	14,075	12,487	14,122	18,513	9.5	112.2
5. COST OF GOODS SOLD	26,239	27.4	27,773	31,229	35,109	39,654	65,625	33.7	150.1
6. UTILITIES	3,384	3.5	4,217	8,405	9,938	11,548	12,546	6.4	270.7
7. TAXES	803	0.8	888	829	862	965	1,156	0.6	44.0
8. RENOVATIONS, ALTERATIONS AND MAJOR REPAIRS	1,317	1.4	1,817	2,318	2,660	3,908	3,999	2.1	203.6
9. EXTERNALLY CONTRACTED SERVICES	7,293	7.6	8,322	10,089	11,331	13,189	14,720	7.6	101.8
10. PRINCIPAL AND INTEREST REPAYMENTS	10,521	11.0	10,711	10,649	10,562	10,374	11,330	5.8	7.7
11. LAND and SITE SERVICES	0	0.0	0	0	105	201	30	0.0	
12. BUILDINGS	0	0.0	0	0	50	260	261	0.1	
13. MISCELLANEOUS	1,112	1.2	962	1,051	1,365	1,215	3,225	1.7	190.0
14. INTERNAL COST ALLOCATIONS	8,346	8.7	8,300	335	285	776	981	0.5	−88.2
TOTAL	95,750	100.0	100,454	115,002	126,467	137,216	194,805	100.0	103.5

(1) Includes equipment and furniture maintenance.

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Table 8

Total University System Trust and Endowment Income: 1977-78 To 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	$	% Share					$	% Share	
1. ONTARIO GOVERNMENT GRANTS AND CONTRACTS									
(i) MCU Grants	1	0.0	4			9	17	0.0	1,600.0
(ii) Other	1,468	4.5	1,885	3,107	1,752	4,390	3,233	5.1	120.2
TOTAL ONTARIO GRANTS	1,469	4.5	1,889	3,107	1,752	4,399	3,250	5.1	121.2
2. OTHER INCOME									
(i) Government Grants and Contracts									
(a) Federal	3,101	9.5	2,345	2,641	2,500	3,829	4,962	7.8	60.0
(b) Other		0.0		381	400	50	70	0.1	
(ii) Gifts, Donations & Non-Government Contracts	15,970	49.2	22,250	18,575	21,659	25,844	45,237	70.9	183.3
(iii) Investment Income	12,183	37.5	14,869	17,115	22,731	31,278	31,379	49.2	157.6
(iv) Miscellaneous	4,847	14.9	4,386	4,807	8,271	9,327	2,564	4.0	−47.1
(v) Interfund Transfers	(5,082)	−15.6	(6,190)	(6,447)	(3,919)	(15,612)	(23,699)	−37.2	366.3
TOTAL OTHER INCOME	31,019	95.5	37,660	37,072	51,642	54,716	60,513	94.9	95.1
TOTAL OPERATING INCOME (1)	32,488	100.0	39,549	40,179	53,394	59,115	63,763	100.0	96.3
UNADJUSTED TOTAL OPERATING INCOME	34,024		43,677	44,811	53,394	59,115	63,763		87.4

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(1) Adjusted for change in definition of trust and endowment revenue in 1980-81, when sales of services and products were netted against expenses.

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Table 9

Total University System Trust and Endowment Expenditures by Object of Expense: 1977-78 to 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	$	% Share					$	% Share	
1. SALARIES AND WAGES									
(i) Faculty (Academic Ranks)	1,782	6.8	1,437	2,358	2,258	2,674	2,764	5.0	55.1
(ii) Other Instruction and Research	1,752	6.7	1,605	2,486	2,328	2,413	3,687	6.7	110.4
(iii) Other Salaries and Wages	4,825	18.4	5,948	6,052	6,301	7,911	10,256	18.6	112.6
TOTAL SALARIES AND WAGES	8,359	31.8	8,990	10,896	10,887	12,998	16,707	30.2	99.9
2. EMPLOYEE BENEFITS	622	2.4	669	830	747	825	1,088	2.0	74.9
TOTAL SALARIES AND BENEFITS	8,981	34.2	9,659	11,726	11,634	13,823	17,795	32.2	98.1
3. LIBRARY ACQUISITIONS	666	2.5	653	741	626	754	823	1.5	23.6
4. EQUIPMENT AND FURNITURE									
(i) Purchase	1,088	4.1	1,172	1,981	2,809	3,078	6,616	12.0	508.1
(ii) Rental	37	0.1	118	188	60	27	90	0.2	143.2
TOTAL EQUIPMENT AND FURNITURE	1,125	4.3	1,290	2,169	2,869	3,105	6,706	12.1	496.1
5. OPERATIONAL SUPPLIES AND EXPENSES (1)	4,236	16.1	5,312	6,278	6,604	6,691	8,750	15.8	106.6
6. RENOVATIONS, ALTERATIONS AND MAJOR REPAIRS	120	0.5	101	355	83	554	309	0.6	157.5
7. EXTERNALLY CONTRACTED SERVICES	25	0.1	13	17	70	109	38	0.1	52.0
8. SCHOLARSHIPS, BURSARIES, etc.	8,152	31.0	8,119	8,759	10,392	12,649	14,822	26.8	81.8
9. PRINCIPAL AND INTEREST REPAYMENTS	0	0.0	0	0	0	123	48	0.1	
10. LAND AND SITE SERVICES	20	0.1	0	0	0	0	212	0.4	960.0
11. BUILDINGS	0	0.0	0	0	0	0	371	0.7	
12. MISCELLANEOUS	2,326	8.9	3,142	3,113	5,223	4,610	5,448	9.9	134.2
13. INTERNAL COST ALLOCATIONS	616	2.3	97	26	78	3	(48)	−0.1	−107.8
TOTAL	26,267	100.0	28,386	33,184	37,579	42,421	55,274	100.0	110.4
ADJUSTED TOTAL (2)	24,731		24,258	28,552	37,579	42,421	55,274		123.5

(1) Includes equipment and furniture maintenance.

(2) Adjusted for change in treatment of sales of services and products by netting out an equivalent level of expenditures from total trust and endowment expenditures from 1977-78 to 1979-80.

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers — Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Table 10

Interprovincial Comparisons of University Revenue, Total Operating Income Per FTE Student: 1977-78 to 1981-82

	1977-78		1978-79		1979-80		1980-81		1981-82	
	$	Rank	$	Rank	$	Rank	$	Rank	$	Rank
British Columbia	5,182	3	5,715	3	6,058	4	6,468	4	7,408	2
Alberta	5,371	2	6,024	2	6,613	2	7,594	1	8,318	1
Saskatchewan	5,049	5	5,662	4	6,232	3	6,378	5	6,822	4
Manitoba	4,441	8	4,780	9	5,423	7	5,483	8	5,968	8
Quebec	5,165	4	5,347	5	5,890	5	6,683	3	7,009	3
New Brunswick	4,582	7	4,830	8	5,690	6	5,890	6	6,098	7
Nova Scotia	4,294	9	4,930	7	5,257	8	5,823	7	6,570	6
P.E.I.	3,256	10	4,418	10	4,973	10	5,073	10	5,566	10
Newfoundland	6,344	1	6,821	1	7,222	1	7,052	2	6,793	5
Weighted average for 9 provinces other than Ontario	5,069		5,451		5,974		6,575		7,071	
Ontario	4,594	6	5,038	6	5,239	9	5,421	9	5,794	9
Canada	4,894		5,304		5,711		6,163		6,616	

SOURCE: Fifth Report of the Tripartite Committee on Interprovincial Comparisons, January, 1984, p. 10.

Table 11

Comparison of Revenue Per Student in Universities and in Elementary and Secondary Schools in Ontario in Constant 1977-78 Dollars, 1977-78 = 100.0: 1977-78 to 1982-83

	Index of Provincial Operating Grants Plus Tuition Fees Per FTE University Student	Index of Provincial Grants Plus Local Tax Revenue Per Elementary and Secondary School Pupil (1)
1977-78	100.0	100.0
1978-79	99.3	98.6
1979-80	95.1	100.4
1980-81	89.2	96.6
1981-82	85.0	102.0
1982-83	84.2	104.5

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(1) Provincial Grants to schools include the provincial contribution to the Teachers' Superannuation Fund.

NOTE: Indexes are in constant 1977-78 dollars, deflated by the January CPI for each year.

SOURCES: Ministry of Colleges and Universities, Ministry of Education.

Table 12

Total University System Operating Income: 1977-78 to 1982-83
($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	($000)	% Share					($000)	% Share	
1. ONTARIO GOVERNMENT GRANTS AND CONTRACTS									
(i) Formula	672,475	78.2	719,823	755,879	811,121	894,118	1,003,960	74.7	49.3
(ii) Extra Formula	9,594	1.1	10,256	10,764	11,154	12,287	13,740	1.0	43.2
(iii) MCU Grants	17,423	2.0	9,781	10,701	10,380	10,796	10,852	0.8	−37.7
(iv) Other	3,770	0.4	3,590	3,545	3,734	3,662	11,627	0.9	208.4
TOTAL ONTARIO GRANTS	703,262	81.8	743,450	780,889	836,389	920,863	1,040,179	77.4	47.9
2. FEES									
(i) Tuition Credit	129,421	15.1	129,864	138,372	163,288	195,460	241,506	18.0	86.6
(ii) Miscellaneous	7,969	0.9	8,215	8,937	10,147	11,110	15,250	1.1	91.4
TOTAL FEES	137,390	16.0	138,079	147,309	173,435	206,570	256,756	19.1	86.9
3. OTHER INCOME									
(i) Government Grants & Contracts									
(a) Federal	121	0.0	261	90	93	140	134	0.0	10.7
(b) Municipal	303	0.0	302	251	245	242	232	0.0	−23.4
(c) Other	0	0.0	0	0	11	7	15	0.0	
(ii) Gifts, Donations & Non-Government Grants	1,353	0.2	1,330	1,161	1,036	825	937	0.1	−30.7
(iii) Investment Income	8,354	1.0	10,616	15,047	17,242	23,647	20,437	1.5	144.6
(iv) Miscellaneous	4,844	0.6	5,081	5,138	6,938	6,901	9,469	0.7	95.5
(v) Interfund Transfers	4,192	0.5	5,462	5,431	7,737	9,917	15,404	1.1	267.5
TOTAL OTHER INCOME	19,167	2.2	23,052	27,118	33,302	41,679	46,628	3.5	143.3
TOTAL OPERATING INCOME (1)	859,819	100.0	904,581	955,316	1,043,126	1,169,112	1,343,563	100.0	56.3
UNADJUSTED TOTAL OPERATING INCOME	873,111		921,558	960,465	1,043,126	1,169,112	1,343,563		53.9

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(1) The 1977-78 to 1979-80 figures are adjusted for the change in definition of operating revenue in 1980-81, when sales of services and products were netted against expenses.

NOTE: excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Table 13

Ontario Universities' Operating Grant from the Ministry of Colleges and Universities: 1977-78 To 1982-83
($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	($000)	% Share					($000)	% Share	
1. FORMULA GRANTS	681,068	97.0	729,922	766,616	822,682	906,738	1,016,844	98.4	49.3
2. EXTRA FORMULA GRANTS									
(i) Differentiation/ Supplementary Grants	2,650	0.4	1,900	1,450	1,250	1,550	1,600	0.2	−39.6
(ii) Northern Grants	2,917	0.4	3,213	3,416	3,591	3,804	4,130	0.4	41.6
(iii) Bilingualism Grants	5,078	0.7	4,627	6,246	6,697	7,372	8,606	0.8	69.5
3. NON-FORMULA LINE-ITEM GRANTS									
(i) Teacher Education	1,258	0.2	663	255	431	400	372	0.0	−70.4
(ii) Off Campus	212	0.0	204	245	311	367	340	0.0	60.4
(iii) Francophone	454	0.1	556	657	784	848	987	0.1	117.4
(iv) Energy Management	147	0.0	175	0	50				−100.0
(v) Building Repairs, Operating Cost Savings and Job Creation	5,800	0.8							−100.0
(vi) Other	2,465	0.3	783	1,165	560	463	497	0.1	−79.8
TOTAL OPERATING GRANTS	702,049	100.0	742,043	780,050	836,356	921,542	1,033,376	100.0	47.2
MUNICIPAL TAX GRANTS	8,121		7,944	7,756	7,765	8,012	8,399		3.4

NOTE: Excludes Ministry of Colleges and Universities' Grants for farm mechanics program, Bar Admission course, University of Toronto Schools, Royal Conservatory of Music, and O.E.C.A.

SOURCE: Ministry of Colleges and Universities.

Table 14

Interprovincial Comparisons of University Grants: Provincial Operating Grants Per FTE Student: 1977-78 To 1982-83

	1977-78		1978-79		1979-80		1980-81		1981-82	
	$	Rank	$	Rank	$	Rank	$	Rank	$	Rank
British Columbia	4,521	3	5,025	3	5,337	3	5,683	4	6,435	2
Alberta	4,797	1	5,339	2	5,813	2	6,758	1	7,386	1
Saskatchewan	4,107	5	4,615	5	5,096	5	5,302	5	5,612	5
Manitoba	3,874	7	4,123	7	4,770	6	4,499	7	5,098	6
Quebec	4,449	4	4,657	4	5,299	4	5,935	2	6,176	3
New Brunswick	3,905	6	4,364	6	4,762	7	4,929	6	4,998	7
Nova Scotia	3,497	9	3,819	9	4,074	10	4,379	9	4,908	8
P.E.I.	3,030	10	3,544	10	4,246	8	4,441	8	4,720	9
Newfoundland	4,625	2	5,485	1	5,994	1	5,684	3	5,847	4
Weighted average for 9 provinces other than Ontario	4,347		4,705		5,231		5,703		6,112	
Ontario	3,669	8	4,002	8	4,140	9	4,273	10	4,476	10
Canada	4,097		4,455		4,840		5,193		5,529	

SOURCE: Fifth Report of the Tripartite Committee on Interprovincial Comparisons, January, 1984, p. 6.

Table 15

Comparison of Revenue Per Student in Universities and in Elementary and Secondary Schools in Ontario in Constant 1977-78 Dollars, 1977-78 = 100.0: 1977-78 to 1982-83

	Index of Provincial Operating Grants Plus Tuition Fees Per FTE University Student	Index of Provincial Grants Plus Local Tax Revenue Per Elementary and Secondary School Pupil (1)
1977-78	100.0	100.0
1978-79	100.0	95.8
1979-80	95.7	96.2
1980-81	88.9	88.6
1981-82	83.9	95.0
1982-83	82.5	94.0

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(1) Provincial Grants to schools include the provincial contribution to the Teachers' Superannuation Fund.

NOTE: Indexes are in constant 1977-78 dollars, deflated by the January CPI for each year.

SOURCES: Ministry of Colleges and Universities, Ministry of Education.

Table 16

Total University System Operating Expenditures by Functional Area: 1977-78 To 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	$	% Share					$	% Share	
1. ACADEMIC EXPENDITURES									
Instruction & Research	559,362	64.4	589,804	621,676	675,968	761,871	859,737	64.8	53.7
Library	61,095	7.0	63,547	67,618	76,110	83,082	92,799	7.0	51.9
Academic Computing	22,566	2.6	23,681	24,549	23,105	28,063	33,012	2.5	46.3
TOTAL ACADEMIC EXPENSES	643,023	74.0	677,032	713,843	775,183	873,016	985,548	74.2	53.3
2. NON-ACADEMIC EXPENDITURES									
Non-Academic Computing	11,651	1.3	13,665	13,983	14,484	16,276	19,034	1.4	63.4
Student Services	28,346	3.3	28,988	31,300	31,639	36,701	43,423	3.3	53.2
Administration	49,107	5.7	53,206	57,509	62,736	71,657	80,171	6.0	63.3
Physical Plant (1)	124,386	14.3	126,738	133,243	144,710	160,911	180,635	13.6	45.2
Other	11,820	1.4	12,479	13,335	15,387	14,637	18,574	1.4	57.1
TOTAL NON-ACADEMIC EXPENSES	225,310	26.0	235,076	249,370	268,956	300,182	341,837	25.8	51.7
TOTAL	868,333	100.0	912,108	963,213	1,044,139	1,173,198	1,327,385	100.0	52.9
ADJUSTED TOTAL (2)	855,041		895,131	948,064	1,044,139	1,173,198	1,327,385		55.2

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(1) Includes taxes for years from 1977-78 to 1980-81 to ensure consistency with remaining years.

(2) Adjusted for change in treatment of sales of services and products by netting out an equivalent level of expenditures from total operating expenditures in 1977-78 to 1979-80.

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Table 17

Total University System Operating Expenditures by Object of Expense: 1977-78 to 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	($000)	% Share					($000)	% Share	
1. SALARIES AND WAGES									
(i) Faculty (Academic Ranks)	340,465	39.2	358,551	378,130	410,370	460,063	521,199	39.3	53.1
(ii) Other Instruction and Research	38,248	4.4	38,765	41,414	45,631	49,707	54,368	4.1	42.1
(iii) Other Salaries and Wages	250,779	28.9	262,280	269,626	289,875	326,037	368,262	27.7	46.8
TOTAL SALARIES AND WAGES	629,492	72.5	659,596	689,170	745,876	835,807	943,829	71.1	49.9
2. EMPLOYEE BENEFITS	70,281	8.1	76,281	77,522	83,119	97,059	115,519	8.7	64.4
TOTAL SALARIES AND BENEFITS	699,773	80.6	735,877	766,692	828,995	932,866	1,059,348	79.8	51.4
3. LIBRARY ACQUISITIONS	17,451	2.0	18,777	20,739	24,010	25,429	28,109	2.1	61.1
4. EQUIPMENT AND FURNITURE									
(i) Purchase	16,766	1.9	18,329	19,486	21,880	25,704	29,256	2.2	74.5
(ii) Rental	8,091	0.9	7,540	6,994	7,159	9,120	10,302	0.8	27.3
TOTAL EQUIPMENT AND FURNITURE	24,857	2.8	25,869	26,480	29,039	34,824	39,558	3.0	59.1
5. OPERATIONAL SUPPLIES AND EXPENSES (1)	50,851	5.8	53,009	56,909	61,570	69,010	74,085	5.6	45.7
6. UTILITIES	34,709	4.0	35,975	33,852	38,901	44,914	48,652	3.7	40.2
7. OTHER EXPENSES									
(i) Taxes	8,343	1.0	8,145	7,914	7,780	8,249	8,672	0.7	3.9
(ii) Renovations, Alterations and Major Repairs	9,645	1.1	8,144	8,760	9,885	11,658	15,097	1.1	56.5
(iii) Externally Contracted Services	11,905	1.4	12,664	12,390	11,968	12,699	16,855	1.3	41.6
(iv) Scholarships, Bursaries, Etc.	5,747	0.7	6,335	6,952	7,923	9,385	11,988	0.9	108.6
(v) Principal and Interest Repayments	294	0.0	311	856	394	307	286	0.0	−2.7
(vi) Land & Site Services	150	0.0	14	39	279	14	15	0.0	−90.0
(vii) Buildings	585	0.1	201	0	817	17	87	0.0	−85.1
(viii) Miscellaneous	20,698	2.4	21,708	23,717	25,227	28,058	29,201	2.2	41.1
(ix) Internal Cost Allocations (2)	−16,675	−1.9	−14,921	−2,087	−2,649	−4,232	−4,568	−0.3	−72.6
TOTAL OTHER EXPENSES	40,692	4.7	42,601	58,541	61,624	66,155	77,633	5.8	90.8
TOTAL	868,333	100.0	912,108	963,213	1,044,139	1,173,198	1,327,385	100.0	52.9
ADJUSTED TOTAL (3)	855,041		895,131	948,064	1,044,139	1,173,198	1,327,385		55.2

(1) Includes equipment and furniture maintenance

(2) Since 1979-80, internal cost allocations under the physical plant functional area have been netted against the objects of expense in physical plant. Therefore, the other objects of expense are $10.906 million larger in 1977-78 and $10.191 million larger in 1978-79 than they would be under the subsequent definition of internal cost allocations.

(3) Adjusted for change in treatment of sales of services and products by netting out an equivalent level of expenditures from total operating expenditures from 1977-78 to 1979-80.

NOTE: Excludes affiliated colleges

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1

Table 18

Academic Staff Complements: 1977-78 to 1982-83

	1977-78	1978-79	1979-80	1980-81	1981-82	1982-83
Full-Time Tenure Stream	9,808	9,926	9,795	9,851	9,976	10,067
Full-Time Limited Term	1,643	1,584	1,584	1,516	1,513	1,523
FTE of Part-Time	1,815.9	1,751.3	1,666.6	1,699.0	1,693.5	1,678.9
TOTAL FTE	13,266.9	13,261.3	13,045.6	13,066.0	13,182.5	13,268.9

NOTE: Data were not available for: Algoma, Nipissing, Hearst and Dominican College, the Ontario College of Art and the church-related affiliates of the provincially-assisted universities. Full-time faculty is reported as of October 1st of each year.

SOURCE: Council of Ontario Universities.

Table 19

Total University System Capital Income: 1977-78 to 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	($000)	% Share					($000)	% Share	
1. ONTARIO GOVERNMENT FUNDING									
(i) MCU Grants	2,070	4.8	11,812	10,210	12,159	10,746	12,611	30.2	509.2
(ii) Other	9,259	21.3	6,947	6,287	17,408	22,238	16,508	39.5	78.3
(iii) Long Term Debt (Borrowings)	17,639	40.5	0	0	0	0	0	0.0	-100.0
TOTAL ONTARIO GOVERNMENT FUNDING	28,968	66.5	18,759	16,497	29,567	32,984	29,119	69.6	0.5
2. OTHER INCOME									
(i) Non-Government Long Term Debt	6,087	14.0	698	633	1,727	0	657	1.6	-89.2
(ii) Federal Government Grants & Contracts	0	0.0	165	4	0	0	567	1.4	
(iii) Fees (Miscellaneous)	0	0.0	38	39	39	0	0	0.0	
(iv) Gifts, Donations & Non-Government Grants	3,084	7.1	3,070	2,086	4,058	4,525	2,980	7.1	-3.4
(v) Investment Income	3,121	7.2	2,834	3,082	3,016	3,753	3,759	9.0	20.4
(vi) Miscellaneous	1,012	2.3	2,106	1,750	2,902	1,088	911	2.2	-10.0
(vii) Interfund Transfers	1,258	2.9	1,150	1,785	621	2,381	3,825	9.1	204.1
TOTAL OTHER INCOME	14,562	33.5	10,061	9,379	12,363	11,747	12,699	30.4	-12.8
TOTAL CAPITAL INCOME (1)	43,530	100.0	26,820	25,876	41,930	44,731	41,818	100.0	-3.9
UNADJUSTED TOTAL CAPITAL INCOME	43,936		29,224	26,339	41,930	44,731	41,818		-4.8

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(1) 1977-78 to 1979-80 figures exclude sales of services and products to ensure consistency with remaining years when sales of services and products were netted against expenses.

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1

Table 20

Historical Summary
Capital Funding for Universities, Ryerson, OCA: 1944-64 to 1983-84
($000)

	OUCAC Debentures(4)	Capital Grants	Special Capital	Health(2) Sciences	Min. of Energy	Wintario Grants(3)	Minor Repairs & Maintenance	Total
1944-64		83,448						83,448
1964-65	45,600							45,600
1965-66	89,239							89,239
1966-67	93,105							93,105
1967-68	99,995							99,995
1968-69	132,974							132,974
1969-70	101,619			7,634				109,253
1970-71	111,760			28,045				139,805
1971-72	114,739			21,308				136,047
1972-73	89,162			9,550				98,712
1973-74	46,254			8,238				54,492
1974-75	17,398			4,244				21,642
1975-76	16,236			4,176	435		2,746	23,593
1976-77	11,190			5,330	115	985	4,086	21,706
1977-78	18,250			7,693	146		5,800(1)	31,889
1978-79		15,247		2,076	178			17,501
1979-80		13,500		5,107	45	930		19,582
1980-81		13,500		4,924	50	2,170		20,644
1981-82		13,500		8,774	515			22,789
1982-83		14,270		5,100	250		10,000(5)	29,620
1983-84(7)		12,200	7,439(6)	5,100	1,043			25,782
CUMULATIVE	1,153,186		7,439	127,299	2,777	4,085	22,632	1,317,418

(1) Amount added to operating grant base in 1979-80.
(2) Excludes bridge financing grants, but includes $804,000 for biohazard containment in 1979-80.
(3) Amounts committed in the year shown.
(4) Capital projects funded by debentures issued by the Government of Ontario.
(5) BILD Summer and Winter job creation program.
(6) BILD - Part of $16.55 million - Capital works acceleration program, 1983-85.
(7) Excludes $12 million grants for undergraduate teaching equipment and library books and facilities acquisition - reported under operating grants.
SOURCE: Ministry of Colleges and Universities.

Table 21

Annual OCUA Recommendation for New Capital Funding for Major Repairs, Renovations and Replacement Projects and Government Allocation of Capital Grants: 1976-77 to 1983-84

($000)

	1976-77	1977-78	1978-79	1979-80	1980-81	1981-82	1982-83	1983-84
(A) GRANTS FOR WHICH OCUA MAKES RECOMMENDATIONS:								
OCUA Recommendation for Funding of New Major Repairs, Renovations and Replacement Projects (Excluding Carry-Overs and New Construction)	11,800.0	14,100.0	14,500.0	17,900.0	19,100.0	21,200.0	23,100.0	25,300.0
(B) GOVERNMENT GRANTS IN RESPONSE TO THE OCUA RECOMMENDATIONS:								
1. Major Renovations and Repairs								
New Starts	6,182.0	6,533.8	5,326.0	850.0	4,661.9	6,305.0	4,470	6,372.0
(Shortfall in Government New Capital Funding for Major Repairs and Renovations)	(5,618.0)	(7,566.2)	(9,174.0)	(17,050.0)	(14,438.1)	(14,895.0)	(18,630)	(18,928)
(C) GOVERNMENT GRANTS FOR WHICH OCUA DOES NOT MAKE RECOMMENDATIONS:								
1. Major Renovations and Repairs (continued)								
Carry-Overs	2,523.4	4,865.0	2,499.1	10,451.1	7,072.1	5,464.5	5,530	5,828
2. New Construction								
New Starts	2,208.0	411.7	2,118.0	—	50.0	—	—	—
Carry-Overs	—	5,769.5	5,303.5	2,198.9	1,716.0	1,730.5	3,500	—
TOTAL	2,208.0	6,181.2	7,421.5	2,198.9	1,766.0	1,730.5	3,500	—
3. Land Purchases								
New Starts	—	609.0	—	—	—	—	—	—
Carry-Overs	276.6	—	—	—	—	—	—	—
TOTAL	276.6	609.0	—	—	—	—	—	
TOTAL GOVERNMENT CAPITAL GRANTS (1)	11,190.0	18,189.0	15,246.6	13,500.0	13,500.0	13,500.0	13,500.0	12,200

Notes: 1. Sum of "New Starts" in Section (B) and "New Starts" and "Carry-Overs" in Section (C).

SOURCE: Ministry of Colleges and Universities.

Table 22

Total University System Capital Expenditures: 1977-78 to 1982-83
($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 to 1982-83
	($000)	% Share					($000)	% Share	
1. SALARIES AND WAGES									
(i) Other Salaries and Wages	8	0.0	106	72	8	8		0.0	−100.0
2. EMPLOYEE BENEFITS			9	8					
TOTAL SALARIES & BENEFITS	8	0.0	115	80	8	8	0	0.0	−100.0
3. LIBRARY ACQUISITIONS	63	0.1	48	57	242	84	74	0.2	17.5
4. EQUIPMENT AND FURNITURE									
(i) Purchase	4,032	8.0	3,477	2,937	1,396	3,451	6,439	14.2	59.7
5. OPERATIONAL SUPPLIES AND EXPENSES	237	0.5	398	408	413	435	20	0.0	−91.6
6. RENOVATIONS, ALTERATIONS AND MAJOR REPAIRS	6,427	12.8	4,793	4,208	9,472	10,255	14,247	31.3	121.7
7. PRINCIPAL AND INTEREST REPAYMENTS	1,613	3.2	1,649	73	93	136	94	0.2	−94.2
8. LAND AND SITE SERVICES	996	2.0	2,734	1,435	612	489	1,071	2.4	7.5
9. BUILDINGS	36,759	73.2	21,451	18,587	39,443	26,076	23,447	51.6	−36.2
10. MISCELLANEOUS	73	0.1	95	19	43		46	0.1	−37.0
11. INTERNAL COST ALLOCATIONS	6	0.0	−46	−22			43	0.1	616.7
TOTAL	50,214	100.0	34,714	27,782	51,721	40,934	45,481	100.0	−9.4
ADJUSTED TOTAL (1)	49,808		34,310	27,319	51,721	40,934	45,481		−8.7

(1) Adjusted for change in treatment of sales of services and products by netting out an equivalent level of expenditures from total capital expenditures from 1977-78 to 1979-80.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

NOTE: Excludes affiliated colleges.

Table 23

Total University System Sponsored Research Income: 1977-78 to 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 to 1982-83
	($000)	% Share					($000)	% Share	
1. ONTARIO GOVERNMENT FUNDING									
(i) MCU Grants	1,289	1.0	89	59	28	365	1,207	0.4	−6.4
(ii) Other	21,971	17.2	26,229	28,520	29,413	35,423	45,766	16.7	108.3
TOTAL ONTARIO GOVERNMENT FUNDING	23,260	18.2	26,318	28,579	29,441	35,788	46,973	17.1	101.9
2. FEDERAL GOVERNMENT GRANTS AND CONTRACTS	75,316	58.8	76,293	91,452	111,722	142,213	153,381	55.9	103.6
3. OTHER INCOME									
(i) Municipal Government Grants	6	.0	140	388	179	148	163	0.1	2616.7
(ii) Other Government Grants & Contracts	0	0.0	0	3,926	4,408	5,378	6,612	2.4	
(iii) Gifts, Donations & Non-Government Grants	21,359	16.7	28,705	34,501	42,319	61,087	59,361	21.6	177.9
(iv) Investment Income	894	0.7	1,030	1,243	1,739	2,524	2,557	0.9	186.0
(v) Miscellaneous	7,481	5.8	11,945	8,477	9,205	720	799	0.3	−89.3
(vi) Interfund Transfers	−267	−0.2	8	−38	−3,223	3,388	4,492	1.6	1,782.4
TOTAL OTHER INCOME	29,473	23.0	41,828	48,497	54,827	73,245	73,984	27.0	151.0
TOTAL SPONSORED RESEARCH INCOME (1)	128,049	100.0	144,439	168,528	195,790	251,246	274,338	100.0	114.2
UNADJUSTED TOTAL SPONSORED RESEARCH INCOME	128,348		144,747	168,993	195,790	251,246	274,338		113.7

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(1) 1977-78 to 1980-81 figures exclude sales of services and products to ensure consistency with remaining years when sales of services and products were netted against expenses.

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Table 24

Total University System Sponsored Research Expenditures by Object of Expense: 1977-78 to 1982-83

($000)

	1977-78		1978-79	1979-80	1980-81	1981-82	1982-83		% Change 1977-78 To 1982-83
	($000)	% Share					($000)	% Share	
1. SALARIES AND WAGES									
(i) Faculty (Academic Ranks)	9,808	7.8	12,495	14,183	16,016	19,710	23,813	8.6	142.8
(ii) Other Instruction and Research	25,916	20.6	32,898	30,235	34,006	44,215	57,296	20.6	121.1
(iii) Other Salaries and Wages	34,000	27.1	31,428	43,101	49,288	54,357	62,222	22.4	83.0
TOTAL SALARIES AND WAGES	69,724	55.5	76,821	87,519	99,310	118,282	143,331	51.6	105.6
2. EMPLOYEE BENEFITS	4,607	3.7	4,691	5,079	5,847	7,597	9,606	3.5	108.5
TOTAL SALARIES AND BENEFITS	74,331	59.2	81,512	92,598	105,157	125,879	152,937	55.1	105.8
3. LIBRARY ACQUISITIONS	390	0.3	314	629	738	597	586	0.2	50.3
4. EQUIPMENT AND FURNITURE									
(i) Purchase	9,396	7.5	11,523	16,783	21,111	33,359	41,755	15.0	344.4
(ii) Rental	251	0.2	255	352	372	482	697	0.3	177.7
TOTAL EQUIPMENT AND FURNITURE	9,647	7.7	11,778	17,135	21,483	33,841	42,452	15.3	340.1
5. OPERATIONAL SUPPLIES AND EXPENSES (1)	26,822	21.4	32,520	36,476	42,118	47,650	56,591	20.4	111.0
6. UTILITIES	6	0.0	52	586	574	796	1,188	0.4	19,700.0
7. RENOVATIONS, ALTERATIONS and MAJOR REPAIRS	907	0.7	177	82	53	316	190	0.1	−79.1
8. EXTERNALLY CONTRACTED SERVICES	22	0.0	36	83	98	143	275	0.1	1150.0
9. SCHOLARSHIPS, BURSARIES, Etc.	233	0.2	305	413	542	598	621	0.2	166.5
10. MISCELLANEOUS	6,457	5.1	12,210	12,652	14,058	16,624	19,637	7.1	204.1
11. INTERNAL COST ALLOCATIONS	6,812	5.4	5,617	1,708	2,164	3,204	3,262	1.2	−52.1
TOTAL	125,627	100.0	144,521	162,362	186,985	229,648	277,739	100.0	121.1
ADJUSTED TOTAL (2)	125,328		144,213	161,897	186,985	229,648	277,739		121.6

(1) Includes equipment and furniture maintenance.

(2) Adjusted for change in treatment of sales of services and products by netting out an equivalent level of expenditures from total sponsored research expenditures from 1977-78 to 1979-80.

NOTE: Excludes affiliated colleges.

SOURCE: Committee of Finance Officers - Universities of Ontario, *Financial Report of Ontario Universities*, Vol. 1.

Council's Advisory Memoranda

84-I Compulsory Ancillary Fees

In her letter of June 8, 1983, to the Chairman of Council, the Minister of Colleges and Universities referred to Advisory Memorandum 82-XII, and accepted, for 1983-84, Council's Recommendation 82-25:

> That all compulsory ancillary fees charged by any of the provincially-assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College be eligible for support under the Ontario Student Assistance Program.[1]

The Minister further indicated her continuing concern about the level of ancillary fees, asking that Council:

> . . . proceed immediately to establish a data collection and monitoring system . . . [and] work towards the determination of an identifiable point at which the 'unreasonable' fee level criterion identified in the Advisory Memorandum [82-XII] comes into play.[2]

In response to the Minister's request, Council worked with the Council of Ontario Universities (COU) to devise an improved reporting format to be used in surveying the universities for comprehensive information on all their respective "compulsory ancillary fees."[3] On February 14, 1984, COU submitted to Council the final version of the survey results. The following memorandum outlines Council's views on compulsory ancillary fees, presents policy options, analyzes the survey information which has been gathered, and recommends the continued coverage of these fees under the Ontario Student Assistance Program (OSAP).

Defining an Unreasonable Level of Compulsory Ancillary Fees

The key element in addressing the Minister's concern is to identify an unreasonable level of compulsory ancillary fees. One approach would be to develop a formula quantifying a particular level of compulsory ancillary fees that was judged to be unreasonable. An alternative approach would be to monitor changes in compulsory ancillary fees and to exercise judgement as to whether such changes were reasonable or unreasonable.

Council examined several ways of setting a quantifiable limit on these fees, but all had serious drawbacks. For example, the current practice of reducing the operating grant for institutions whose tuition fee levels exceed 110% of the level of formula fees could be modified to include all or some general and program-specific ancillary fees.[4] Alternatively, limits could be placed on annual percentage increases allowed for compulsory ancillary fees, and the limits could perhaps be related to increases in the cost of living. Such approaches could, as described below, entail significant problems.

Action by Government to restrict the authority of the institutions to establish their own ancillary fee levels would be intrusive. An immediate difficulty would arise in attempting to regulate by a formula the complex array of program specific ancillary fees which are charged on a per course basis and by program. General ancillary fees are universally applied and could be regulated by such an approach, but the current variance in these fee levels among the institutions would make the setting of a ceiling most undesirable. In examining the potential effects of setting limits on total fee levels the following problems have been identified:

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[1] Ontario Council on University Affairs, A.M. 82-XII, *Ninth Annual Report*. 1982-83, p. 138.

[2] Letter from the Honourable Dr. B. Stephenson to Dr. B. C. Matthews, June 8, 1983, p. 1.

[3] Compulsory ancillary fees are those fees "imposed or administered by a given institution or one of its constituent parts, in addition to regular tuition fees, which a student was required to pay upon registration or in order to fulfill the requirements of the academic program in which he or she was registered".
Council of Ontario Universities, *Incidental Fees*, August 25, 1982, p. 1.

[4] Consistent with the definitions used in Advisory Memorandum 82-XII, "general ancillary fees" are those service and activity-related fees charged to all full-time undergraduate students regardless of their programs of study; "program-specific ancillary fees" are those instruction-related fees charged only to students enrolled in specific programs. One-time only fees (such as convocation or thesis-binding) and penalty and user fees (such as late registration or transcripts, respectively) have been omitted either because they are not compulsorey or are relatively insignificant in cost.

i) If the limit chosen were set at a high level to allow for the inclusion of most fees currently being charged, there would be a strong likelihood (based on experience with the 10% discretionary limit) that institutions with fee levels below the limit would soon move to the higher level. Thus the "ceiling" could also become a "floor", and lower compulsory ancillary fee charges currently being paid by many students could possibly increase.

ii) If the limit chosen were set at a low level which was exceeded by fees at many institutions, there might have to be "roll-backs" of some fees, which would prevent institutions from recovering the actual costs of some services provided.

iii) If virtually any system-wide compulsory ancillary fee limit were established to regulate charges, inequities could develop in providing students with goods, services and facilities which now exist but which often vary markedly in kind and quality, as required, from one institution to another. For example, regulation to restrict these fee levels to a prescribed limit could cause difficulty within institutions in determining which services might have to be reduced or phased-out in order to comply with a prescribed limit.

Given these difficulties in fixing a quantifiable level by which to define unreasonable, and against which to gauge fee levels, Council believes that a review of the fundamental principles underlying these fees can provide the context in which compulsory ancillary fees may be judged to be reasonable or unreasonable. Three basic principles define this context:

i) compulsory ancillary fees should not be allowed to rise to a level which impedes accessibility;

ii) compulsory ancillary fees should not pay for costs traditionally covered by general tuition fees;

iii) compulsory ancillary fees should reflect the cost of goods and services provided.

The first two principles re-emphasize positions put forward by Council in Advisory Memorandum 82-XII: namely, that the concern for accessibility which underlies Government's control of tuition fee levels also pertains to compulsory ancillary fee levels; and that "back-door" tuition fees in the guise of compulsory ancillary fees are unacceptable. The third principle, suggesting that compulsory ancillary fees should not be a means of generating extra institutional revenue or profit, has been added as a result of Council's discussions this year. Reference to these principles is essential in determining whether compulsory ancillary fees are reasonable or unreasonable.

Council's current review indicates that these principles underlying compulsory ancillary fees appear to be generally understood, are being upheld by the institutions at this time, and that these principles should continue to inform the setting of compulsory ancillary fees by the institutions. Restrictive policy options which could be enacted, such as a formula approach, might create solutions more harmful than existing problems with compulsory ancillary fees. Therefore, establishing an exact, quantifiable level beyond which compulsory ancillary fees were deemed to be unreasonable would be undesirable.

Council proposes, therefore, to review compulsory ancillary fees annually, using as a guideline for evaluation the three principles enunciated this year. This review will be accomplished through a monitoring process in which Council will gather, analyze and judge data on compulsory ancillary fees. As the basis of its analysis, Council will examine whether compulsory ancillary fees appear to be increasing in number and level in programs and disciplines where such fees have traditionally existed and whether they are being established in other programs and disciplines as well. Also, using OSAP data pertaining to compulsory ancillary fees, Council will attempt to evaluate the effect of these fee levels on the program and discipline choices of lower-income students in comparison with choices made by the general student population.

In addition to its own proposed actions regarding compulsory ancillary fees, Council urges the institutions to continue the traditional practice of consulting with students regarding the application of and changes in the levels of these fees. Council further suggests that the institutions should make it a practice to inform students about all compulsory ancillary fees, and to provide them with clear statements of tuition and other fees by program.

Data Base for Compulsory Ancillary Fees

Since receiving the Minister's letter of May 5, 1982, Council requested COU to carry out two surveys of the institutions concerning compulsory ancillary fees. Council presented an analysis of the results of the 1982-83 survey in Advisory Memorandum 82-XII. A re-statement of that information and an evaluation of the findings of the 1983-84 survey are presented in the various tables and appendices of this memorandum.

Cognizant of the Minister's request that the methodology of the second survey be improved in order to establish a "standard data reporting format for use in future analyses,"[5] Council emphasized this year not only that institutions should ensure comprehensive reporting of their 1983-84 compulsory ancillary fees, but also that they should verify information reported in the 1982-83 survey. Therefore, the data for 1982-83, as displayed in Tables 1, 3 and Appendix A, have been confirmed and are more comprehensive than those yielded by the original 1982-83 survey. Despite improvements, however, the cautionary comment advanced in Advisory Memorandum 82-XII that the data were "somewhat inadequate"[6] still applies with respect to some data gathered in the 1983-84 survey.

This is true, in part, because of the difficulty in establishing uniform categories for the diverse types of ancillary fees which have evolved over time in different ways at individual institutions. This ongoing problem was alluded to last year:

> . . . significant differences exist among institutions in terms of the definitions applicable to the various kinds of ancillary fees. In some cases different services are subsumed under fees with similar titles; while in others, variously identified fees are employed to support identical services.[7]

As shown in Tables 1 and 2, Council has developed six categories under which the many general ancillary fees may appropriately be listed:

a) Health
b) Registration
c) Capital
d) Student Activity
e) Athletics
f) Other

All general ancillary fees reported in the 1982-83 and 1983-84 surveys have been incorporated into this format to allow comparisons between years and among institutions. In updating the 1982-83 information, and in displaying it along with corresponding data for 1983-84, Council has been able, with exceptions indicated in the footnotes to Tables 1 and 2, to eliminate the fee ranges and to identify the amount which each full-time undergraduate student at each institution surveyed paid in general ancillary fees in 1982-83 and 1983-84.

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[5] Letter from the Honourable Dr. B. Stephenson to Dr. B. C. Matthews, June 8, 1983, p. 1.

[6] Ontario Council on University Affairs, A.M. 82-XII, *Ninth Annual Report*, 1982-83, p. 131.

[7] *Ibid.*, p. 131.

Similarly, Council has established, as shown in Tables 3 and 4 and Appendices A and B, eleven categories under which the various program-specific ancillary fees may appropriately be listed:[8]

a) Registration
b) Music and Studio Related
c) Professional Societies
d) Co-op Placement
e) Consumable Supplies
f) Lab and Equipment
g) Manuals and Duplication
h) Laundry
i) Kits
j) Travel
k) Other.

As noted in the tables of the Appendices, these fees are charged in several ways: per course by year; per course by term; per program by year; or per program by term. The number of students paying each program-specific ancillary fee which has been identified is indicated, as is the department or program charging the fee and whether it was student-initiated. This information, therefore, demonstrates the various fee levels and the disciplines in which they prevail. Again, as for general ancillary fees, this format for displaying program-specific ancillary fees permits comparisons between years and among institutions, and eliminates fee ranges, except for instances mentioned in the footnotes to the tables of the Appendices.

While the responses of the institutions to the survey have improved greatly overall from last year, there are in all probability a number of compulsory ancillary fees which have been overlooked in reporting. Annual monitoring will encourage even more exhaustive reporting of these fees by the institutions and should be accompanied by regular adjustments to improve the survey's format. Council is satisfied, however, that progress has been made in clarifying the complex, heterogenous system of compulsory ancillary fees which exists across the institutions, and that the rudiments of a system-wide data base for analyzing future trends are now in place.

1. General Ancillary Fees

Before reviewing the general ancillary fee data gathered in 1982-83 and 1983-84 and displayed in Tables 1 and 2, respectively, some qualifying statements are necessary. Foremost is the fact that the criterion of universality of application has been used as the guiding principle in determining which compulsory ancillary fees can be grouped under the "general heading." The universal applicability of these various fees does not, however, eliminate occasional discrepancies which are inherent in attempting to categorize fees in which diverse elements occur as often as areas of correspondence.

One should bear in mind that the marked differences which appear across the institutions in the levels of general ancillary fees reflect variations in the kinds and quality of services being provided. (For instance, health service fees which may at first appear inordinately high at one institution often reveal, on closer examination, that accident, health and/or life insurance packages are included which are not offered where fees are lower.) Also, categories which encompass general ancillary fees charged by one institution are not appropriate for the incorporation of similar types of fees elsewhere which are not charged on a general basis. (A prime example occurs

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8. Organizing compulsory ancillary fees under certain categories is also done in the *Reference Manual* of the Ontario Student Assistance Program. Compulsory ancillary fees which are program-specific and eligible for OSAP coverage are: co-op fees; expendable supplies (stationery, film, art supplies, other expendable course-related supplies); field trips and local transportation (compulsory field trips and exceptional travel expenses for transportation to locations for practice teaching, field placement, etc.); major equipment (cameras, musical instruments, medical or dental equipment); and professional association and examination fees. Maximum allowance levels are set for each category, with certain programs, such as Fine Arts, being permitted somewhat higher ceilings, presumably in recognition of the cost of materials. This system suggests that certain study activities, and, by extrapolation, certain disciplines and/or programs, are traditionally recognized as entailing special costs, identified herein as program-specific ancillary fees.

Ministry of Colleges and Universities, Ontario Student Assistance Program *Reference Manual*, pp. VI-115 to VI-119.

Table 1

Undergraduate General Ancillary Fees: 1982-83

FEE TYPE	Brock	Carleton	Guelph[1]	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto[2]	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson	OCA	AVGS.
HEALTH: *Sub-Total*	15.00	19.25	26.70	10.00	17.00	12.00	20.00	7.00	18.12	25.00	21.24	21.50	6.00	10.00				$16.34
Services	15.00	19.25	14.70	10.00	13.75	12.00	20.00	7.00	18.12	25.00	21.24	21.50	6.00	10.00				
Accident/health insurance			12.00															
Life Insurance					3.25													
REGISTRATION: *Sub-Total*	3.00				12.00		5.00		1.00	95.00							35.00	$25.17
Registration					10.00		5.00											
I.D. Card	3.00				2.00				1.00									
College Fee										95.00							35.00	
CAPITAL: *Sub-Total*		20.00	20.00		20.00		12.00	18.26			10.00	17.00		10.00		4.00	5.00	$13.63
Univ. Centre		20.00	20.00				12.00	18.26				10.00		10.00				
Rec. Facilities											10.00					4.00		
Science Bldg.																		
Future Projects					20.00												5.00	
Arena												7.00						
Operations																		
Ancillary Ops.																		
STUDENT ACTIVITY: *Sub-Total*	25.00	60.50	45.00	39.00	46.50	50.00	30.00	55.00	17.75	57.25	23.00	35.50	55.00	47.00	50.00	65.70	20.00	$42.48
Incidental Activity								47.50							50.00			
Special Activity																13.20		
"Quest Fund"								7.50										
Student Association	25.00	60.50	45.00	39.00	46.50	50.00	30.00		17.75	57.25	23.00	35.50	55.00	47.00		52.50	20.00	
ATHLETICS: *Sub-Total*	30.00	67.80	36.00	25.00	30.00	27.00	35.00	30.00	45.19	55.00	34.00	44.25	33.00	20.00		12.80		$35.00
OTHER: *Sub-Total*									27.40	50.00				17.50	70.00	25.00		$37.98
General Ancillary															70.00			
Hart House									27.40									
Bus/Parking										50.00								
Learning Support																25.00		
Student Centre														17.50				
TOTALS	$73.00	$167.55	$127.70	$74.00	$125.50	$89.00	$102.00	$110.26	$109.46	$282.25	$88.24	$118.25	$94.00	$104.50	$120.00	$107.50	$60.00	$114.89

SOURCE: COU and individual institutions.

1. Guelph: *Student Activity*. Fees shown for 1982-83 and 1983-84 represent averages of ranges from $40.00 - $50.00 and $42.00 - $50.00, respectively, within which fee levels vary according to program.
2. *Toronto: Health, Athletics and Other (Hart House)*. Fees shown for 1982-83 and 1983-84 represent the average cost per student across the institution and its affiliated colleges, and have been determined using information provided by the university on enrolment and fee charges. The Registration fee shown of $1.00 (student card) is universally charged, while fees for registering at the colleges and covering costs specific to them have been removed from the general ancillary fee area and displayed as program-specific fees under the Registration category in the appendices.

Table 2

Undergraduate General Ancillary Fees: 1982-83

FEE TYPE	Brock	Carleton	Guelph[1]	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's[3]	Toronto[2]	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson	OCA	AVGS.
HEALTH: *Sub-Total*	15.00	26.40	33.40	10.00	17.00	12.00	20.00	9.00	18.67	25.00	34.11	24.50	6.00	10.00				$18.65 +14.1
Services	15.00	*21.00	*15.60	10.00	13.75	12.00	20.00	*9.00	18.67	25.00	*34.11	24.50	6.00	10.00				
Accident/health. insurance		*5.40	*17.80															
Life Insurance					3.25													
REGISTRATION: *Sub-Total*	5.00				7.00		5.00		1.00	90.00							40.00	$24.67 -2.0
Registration					5.00		5.00											
I.D. Card	5.00				2.00				1.00									
College Fee										90.00							40.00	
CAPITAL: *Sub-Total*	5.00	20.00	20.00		20.00		12.00	19.50			20.00	17.00		10.00		4.00	5.00	$13.86 +1.7
Univ. Centre		*20.00	20.00				12.00	*19.50				*10.00		10.00				
Rec. Facilities											*20.00					4.00		
Science Bldg.	5.00																	
Future Projects					*20.00												*5.00	
Arena												*7.00						
Ancillary Operations																		
STUDENT ACTIVITY: *Sub-Total*	25.00	60.50	46.00	39.00	46.50	50.00	30.00	49.60	15.25	57.25	23.00	35.50	55.00	44.50	50.00	69.70	27.00	$42.58 +0.2
Incidental Activity								*42.10							50.00			
Special Activity																13.20		
"Quest Fund"								*7.50										
Student Association	25.00	*60.50	*46.00	*39.00	*46.50	50.00	*30.00		*15.25	*57.25	*23.00	*35.50	*55.00	44.50		56.50	27.00	
ATHLETICS: *Sub-Total*	30.00	72.80	40.00	25.00	30.00	30.00	35.00	28.00	46.77	59.00	36.00	48.65	35.00	20.00		12.80		$36.60 +4.6
OTHER: *Sub-Total*								7.20	30.52	75.00				17.50	76.00	25.00		$30.54 +1.5
General Ancillary															76.00			
Hart House									30.52									
Bus/Parking								*7.20		75.00								
Learning Support																25.00		
Student Centre														17.50				
TOTALS	$80.00	$179.70	$139.40	$74.00	$120.50	$92.00	$102.00	$113.30	$112.21	$306.25	$113.11	$125.25	$96.00	$102.00	$126.00	$111.50	$72.00	$121.51
% CHANGE 1982-83/1983-84	+9.6	+7.3	+9.2	0.0	-4.0	+3.4	0.0	+2.8	+2.5	+8.5	+28.2	+6.3	+2.1	-2.4	+5.0	+3.7	+20.0	+5.8

*Indicates fees which were initiated by students, except in the cases of Health fees at Carleton and Guelph which were reported as being only partially student-initiated. All other fees shown were either not student-initiated or their origin is unknown.

1. *Guelph: Student Activity.* Fees shown for 1982-83 and 1983-84 represent averages of ranges from $40.00 - $50.00 and $42.00 - $50.00, respectively, within which fee levels vary according to program.
2. *Toronto: Health, Athletics and Other (Hart House).* Fees shown for 1982-83 and 1983-84 represent the average cost per student across the institution and its affiliated colleges, and have been determined using information provided by the university on enrolment and fee charges. The Registration fee shown of $1.00 (student card) is universally charged, while fees for registering at the colleges and covering costs specific to them have been removed from the general ancillary fee area and displayed as program-specific fees under the Registration category in the appendices.
3. *Queen's: Student Activity:* The fee reported for 1983-84 has been broken down into three components. Two of these, Incidental Activity ($42.10) and the Quest Fund ($7.50), appear under the Student

under the registration category regarding college fees: Trent's college fees are universally applied enabling them to be displayed as general fees, while similar fees at the University of Toronto vary among the colleges and do not apply to non-collegiate students, necessitating that they be listed under the program-specific ancillary fees in the registration category.) A separate but related cautionary note is that, while historical comparisons can be made in some cases by relating general ancillary fee data collected in 1982-83 and 1983-84 with that gathered in 1977-78 by P.S. Ross and Partners, under the sponsorship of the Ministry of Colleges and Universities, variations in the standards used to establish data bases often make comparisons difficult. Despite such factors and the diversity among general ancillary fees, a number of helpful observations may be made.

Tables 1 and 2 show data gathered on general ancillary fees in the 1982-83 and 1983-84 surveys. As indicated, the average percentage increase for these fees for all institutions over this period was 5.8%, representing an increase of $6.62 for the year. A 5% formula fee increase occurred during the same period.

Seven institutions (Brock, Carleton, Guelph, Trent, Waterloo, Western and OCA) showed percentage increases in general ancillary fee totals that were higher than the overall average increase of 5.8%. Waterloo had the largest increase of 28.2%; however, the total dollar amount charged, $113.11, was not out of line when compared with charges elsewhere, which averaged $121.51. The institution with the highest total general ancillary fee charge was Trent University at $306.25 (up 8.5% between 1982-83 and 1983-84). As previously mentioned, this amount includes college fees.

Of the ten institutions whose percentage increases were below the overall average increases of 5.8%, Lakehead and Ottawa showed no increases and Windsor and Laurentian had decreases of 2.4% and 4.0%, respectively. The institution having the lowest total general ancillary fee rate was OCA at $72.00.

The most useful fundamental conclusion which can be drawn from the P.S. Ross study is that, in 1977-78, the average total general ancillary fee for the system was $71.09.[9] When compared with the 1983-84 average total general ancillary fee of $121.51, this represents an increase of 70.9%. Over the same period, formula fees rose 46.3% and the Consumer Price Index rose 55.0%. Given the difficulties in categorization already mentioned and the fact that some of these fees have been increased to reflect rising recovery costs, the increase over this six-year period is not viewed as extraordinary.

While acknowledging the variety in general ancillary fee levels among the institutions, there are indications of consistency in the application of these fees. Services and activities covered by these fees, such as health and athletics, have long been identified and paid for as ancillary, and are, as Council noted previously, "vital to the maintenance of a university community."[10] New fees which are introduced on occasion (such as, in 1983-84, Brock's $5.00 capital fee towards the cost of their science building, and Carleton's $5.40 life insurance fee) appear in areas where general ancillary fees have traditionally existed. Further, comparison of the 1983-84 survey entries with those of the P.S. Ross study in 1977-78 indicates that there has not been a proliferation of general ancillary fees. For example, if one examines the prevalence and level of capital fees, an area of some concern, the number of institutions charging these fees has increased from nine to eleven over the period, but the average charge actually declined to $13.86 in 1983-84 from $21.94 in 1977-78.[11]

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[9] This figure is based on data from the P. S. Ross study's Table 19 and its footnotes, adapted to Council's format and criteria for general ancillary fees as used in this memorandum. *Ministry of Colleges and Universities Study of Tuition and Incidental Fees 1977/78*, P. S. Ross and Partners, January 1979, pp.43-44.

[10] Ontario Council on University Affairs, A.M. 82-XII, *Ninth Annual Report*, 1982-83, p. 133.

[11] *Ministry of Colleges and Universities Study of Tuition and Incidental Fees 1977/78*, P. S. Ross and Partners, January 1979 pp. 43-44.

Table 3

Summary of Undergraduate Program-Specific Ancillary Fees: 1982-83

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
REGISTRATION:																
Range of Fees									$100	$35-150		$50	$50			
MUSIC & STUDIO RELATED:																
Range of Fees									$10-35		$20-60	$100-390	$25			$55
PROF. SOCIETIES:																
Range of Fees						$2-15		$5-33	$5-35		$4-11			$4-13		
CO-OP PLACEMENT:																
Range of Fees						$90					$105		$200			
CONSUMABLE SUPPLIES:																
Range of Fees		$25		$10-25	$20		$10-50	$8-30	$30						$3-200	$15-1,500
LAB & EQUIPMENT																
Range of Fees		$9-350			$20		$50-200	$30-150	$25	$3-20						$6-95
MANUALS & DUPLICATION:																
Range of Fees		$5-10					$6		$16	$3-50				$70		$10-29
LAUNDRY:																
Range of Fees			$20-82		$10	$75		$20-120	$30-100							
KITS:																
Range of Fees						$500		$360	$277-1,674			$130-2,550				$30-384
TRAVEL:																
Range of Fees		$140-150		$100-190		$100		$25-180	$20-168	$5-550	$9-250	$40-150		$25-150		$15-200
OTHER:																
Range of Fees			$21-63							$250						

SOURCE: Extracted from Appendix A.

Table 4

Summary of Undergraduate Program-Specific Ancillary Fees: 1982-83

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
REGISTRATION:																
Average Fee									$63	$95		$50	$52		$10	
Range of Fees									$2-160	$40-150		$50	$52		$10	
# Student Payments									22,078	16		430	60		231	
MUSIC & STUDIO RELATED:																
Average Fee	$15								$30		$30	$120	$13			$15
Range of Fees	$10-25								$20-45		$2-60	$105-410	$13			$15
# Student Payments	103								370		1,377	525	110			18
PROF. SOCIETIES:																
Average Fee						$11		$13	$12		$8			$9		
Range of Fees						$10-20		$6-37	$5-40		$4-11			$4-20		
# Student Payments						2,000		9,813	20,280		16,181			5,871		
CO-OP PLACEMENT:																
Average Fee						$90			$21		$110		$210			
Range of Fees						$90			$21		$110		$210			
# Student Payments						50			62		8,800		319			
CONSUMABLE SUPPLIES:																
Average Fee	$45	$5		$12	$20		$35	$16		$7					$117	$165
Range of Fees	$45	$4-10		$10-25	$20		$10-50	$8-30		$3-40					$5-300	$15-1,500
# Student Payments	93	206		295	810		1,437	474		335					2,095	1,353
LAB & EQUIPMENT:																
Average Fee		$15			$20		$135	$91	$18	$15	$13	$60			$43	$25
Range of Fees		$15			$20		$135	$35-360	$10-20	$6-25	$10-60	$60			$25-45	$5-100
# Student Payments		105			2,267		301	538	15,576	679	4,287	210			1,200	2,223
MANUALS & DUPLICATION:																
Average Fee		$9					$6			$4				$70		$50
Range of Fees		$5-10					$6			$2-7				$70		$50
# Student Payments		500					1,500			983				395		182
LAUNDRY:																
Average Fee			$62		$10	$75		$99	$66		$10					
Range of Fees			$30-110		$10	$75		$40-180	$25-100		$10					
# Student Payments			480		320	100		1,035	734		40					
KITS:																
Average Fee						$500		$360	$987			$1619				$158
Range of Fees						$500		$360	$287-2,058			$170-276				$90-305
# Student Payments						100		75	450			224				778
TRAVEL:																
Average Fee	$200	$141		$50		$100	$145	$128	$166	$140	$53	$127		$66	$49	$147
Range of Fees	$200	$125-175		$10-200		$100	$125-225	$40-180	$35-340	$2-600	$3-425	$40-150		$25-150	$2-65	$30-200
# Student Payments	11	198		1,560		50	101	2,395	472	175	1,136	185		80	160	380
OTHER:																
Average Fee			$50							$250					$50	
Range of Fees			$50							$250					$50	
# Student Payments			$475							25					1,500	

SOURCE: Extracted from Appendix B.

2. Program-Specific Ancillary Fees.

Several caveats need to be mentioned before examining the data in Tables 3 and 4 and Appendices A and B on program-specific ancillary fees. A particularly important fact to note is the difficulty in attempting to determine what overall cost might be incurred in program-specific ancillary fees by an individual student. Many of these fees are charged per course; therefore, total cost would depend on the number and mix of such courses in a student's curriculum. One must note as well that not all courses charge program-specific ancillary fees. Another major problem arises in attempting to identify institutions where, on the basis of their program-specific ancillary fee listings, these fees might appear to be excessive and/or growing in number. Institutions with numerous program-specific ancillary fees across many programs may be offering their students reduced costs and convenience through the centralized, collective buying of ancillary materials, equipment and services. In providing this, however, such institutions may appear to have a large number of program-specific ancillary fees. Other institutions requiring their students to obtain similar kinds of materials, equipment and services for similar programs would not report such fees if their students were left to make purchases at campus bookstores or on the open market.

One should also bear in mind the absence of historical data on program-specific ancillary fees (such as the P.S. Ross study provided for general ancillary fees), and the fact that gaps still remain in these current data. The much improved reporting of program-specific ancillary fees by the institutions in the 1983-84 survey, and the different display format than that of last year, may be interpreted as indicating that these fees have grown rapidly in number, although this may not be the case. Continued careful monitoring of these fees will be necessary before conclusions may be drawn as to whether they are, in fact, increasing in number or level or are being charged in disciplines where such fees did not previously exist.

Table 4 indicates the diversity in cost and application of all program-specific ancillary fees for 1983-84. The fees shown range from a low of, for example, $2.00 at Waterloo in the Music and Studio Related category, to a high of $2,765.00 at Western in the Kits category. Ranges also vary markedly within categories, and even within individual institutions under the same category. For example, travel fees at Trent range from a low of $2.00 to a high of $600.00. (In this instance, as is the case with many program-specific ancillary fees, a student has the option of taking courses involving these expenditures, but if the choice is exercised the associated costs become compulsory.) Within a single course or program the greatest range is in Dentistry at Western where, as shown in Appendix B ix), the fees for instrument kits vary from a low of $170.00 for students in Year IV to a high of $2765.00 for those in Year II. (One should note that similar ranges exist for required medical kits as well; however, some of these charges do not appear in the data because institutions have not identified and reported them as compulsory ancillary fees.) Particular program-specific ancillary fees affect as few as 7 Biology students paying a travel fee at Carleton University (see Appendix B x)), or involve as many as 20,280 students paying fees for professional societies at the University of Toronto (see Appendix B iii)).

On reviewing the 1983-84 data in Appendix B it is evident that most program-specific ancillary fees are associated with Professional and Science programs and departments. Also, certain options, such as Co-operative Placement, seem to require these fees. Few program-specific ancillary fees appear in the Humanities and Social Sciences, the only regular exceptions being Fine Arts, Music and Geography.

Drawing conclusions from the data for program-specific ancillary fees is difficult, largely due to the fact that exhaustive reporting did not occur until the 1983-84 survey. Despite the absence of supporting evidence based on a retrospective analysis, it is Council's opinion that these fees generally appear in programs or departments where they have traditionally been charged, and that, for the most part, these fees continue to cover instructional services, equipment or activities which have regularly been supplemented by ancillary charges.

On the basis of the arguments presented and the available data on compulsory ancillary fees (general and program-specific), and particularly in light of the improved response to the 1983-84 survey vis-a-vis the limited information from previous years, it is Council's judgement that no intervention by Government is required.

Accordingly, Council *recommends to the Minister:*

OCUA 84-1

COMPULSORY ANCILLARY FEES

THAT no action be taken by the Minister regarding compulsory ancillary fees and that the current practice whereby institutions determine the application and level of these fees be allowed to continue, pending recommendations which may result from Council's monitoring process.

Compulsory Ancillary Fees and the Ontario Student Assistance Program

In her letter of June 8, 1983, to the Chairman of Council, the Minister stated that, following receipt of Council's advice on compulsory ancillary fees, she intended "to give consideration to adjusting Ministry policy in a manner consistent with present practice for books and supplies, local travel, etc . . . (for which) OSAP support . . . is limited to an identified maximum".[12] Among the views expressed in Advisory Memorandum 82-XII, Council noted that "the current OSAP policy does not entail substantial payments relating to ancillary fees".[13] This opinion is still held by Council, which also continues to share "Cabinet's concern for the impact of ancillary fees on the provincial policy of accessibility".[14]

Coverage of compulsory ancillary fee charges to university students supported through OSAP in 1983-84 represented only 3.23%, or $1.44 million, of the total cost of grants, and only 2.75%, or $2.93 million, of the total cost of loans.[15] Recognizing that these amounts have grown since 1981-82 by 17.1% ($210,000) for grants and by 45.1% ($910,000) for loans, but noting at the same time that the number of OSAP recipients has increased by approximately 44.0%, Council still views the level of OSAP funds expended on compulsory ancillary fees as being relatively small, and not indicative of substantial indirect support going towards institutional operating costs through this means.[16] Given the relatively low increases required in OSAP support to cover compulsory ancillary fee costs, in contrast to the added burden which low-income students would have to bear if certain compulsory ancillary fees or portions thereof were declared ineligible for coverage by the Ministry, it remains Council's judgement that all compulsory ancillary fees should continue to be eligible for OSAP support.

Accordingly, Council *recommends to the Minister:*

OCUA 84-2

COMPULSORY ANCILLARY FEES AND THE ONTARIO STUDENT ASSISTANCE PROGRAM

THAT all compulsory ancillary fees charged by any of the provincially-assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College should continue to be eligible for support under the Ontario Student Assistance Program.

M. Paikin
Chairman
May 25, 1984

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[12] Letter from the Honourable Dr. B. Stephenson to Dr. B. C. Matthews, June 8, 1983, p.1.

[13] Ontario Council on University Affairs, A.M. 82-XII, Ninth Annual Report, 1982-83, p. 137.

[14] Letter from the Honourable Dr. D. Stephenson to Dr. B. C. Matthews, June 8, 1983, p. 1.

[15] This information was provided by the Student Awards Branch, Ministry of Colleges and Universities.

[16] *Ibid.*

APPENDICES A AND B
UNDERGRADUATE PROGRAM-SPECIFIC ANCILLARY FEES: 1982-83 AND 1983-84

General Caveats

a) The sources of information are COU and individual institutions.

b) Reference to the Ontario College of Art has been deleted as it reported no program-specific ancillary fees for full-time undergraduate students for the Fall and Winter terms.

c) Roman numerals accompanying the course and program listings displayed under the eleven categories of fee types refer to year levels.

d) Where necessary, figures have been rounded to the nearest dollar (i.e. $0.01 to $0.50 to the lower dollar and $0.51 to $0.99 to the higher dollar).

e) Averaging of fee ranges for convenience occurs only in instances where the ranges are $4.00 or less, as indicated below:

Appendix A: 1982-83

Carleton:	A vi)	— *Lab and Equipment*	
		- Biology	- $7-11 = $9
		- Computer Science	- $7-11 = $9
		- Geology	- $7-11 = $9
Ottawa:	A vii)	— *Manuals & Duplication*	
		- Engineering	- $5-$7 = $6
		- Science	- $5-$7 = $6
Toronto:	A vii)	— *Manuals & Duplication*	
		-Science	- $15-$18 = $16

Appendix B: 1983-84

Ottawa:	B vii)	— *Manuals & Duplication*	
		- Science & Engineering	- $5-$7 = $6
Toronto:	B iii)	— *Professional Societies*	
		- Architecture	- $19-$20 = $19
Waterloo:	B x)	— *Travel*	
		- Human Kinetics	- $2-$5 = $3

f) Where large fee ranges were reported within which students were compelled to pay only the minimum charge, and with the option to spend larger amounts, the lowest payment level necessary is shown in the appendices. For those cases, complete ranges are shown below:

Appendix A = 1982-83

Ryerson: A v)	—*Consumable Supplies*	
	- Film/Photo II (Film)	$ 375-$ 415
	- Film/Photo III (Film)	$ 700-$ 905
	- Film/Photo IV (Film)	$1500-$ +
	- Film/Photo III (Photo)	$ 370-$ 579
	- Film/Photo IV (Photo)	$ 530-$ 580
	- Film/Photo III (Media)	$ 15-$ 230
	- Film/Photo IV (Media)	$ 15-$1065
	- Theatre I-III (Tech/Prod)	$ 25-$ 100

Appendix B: 1983-84

Carleton: B x)	—*Travel* - Biology	$ 135-$ 825
Windsor: B x)	—*Travel* - Human Kinetics	$ 25-$ 70
Ryerson: B v)	—*Consumable Supplies*	
	- Film/Photo II (Film)	$ 375-$ 415
	- Film/Photo III (Film)	$ 700-$ 905
	- Film/Photo IV (Film)	$1500-$ +
	- Film/Photo III (Photo)	$ 370-$ 579
	- Film/Photo IV (Photo)	$ 530-$ 580
	- Film/Photo III (Media)	$ 15-$ 230
	- Film/Photo IV (Media)	$ 15-$1065

g) Where 1982-83 information remained incomplete in not identifying particular courses and/or programs to which reported fees pertained, the courses and/or programs identified in 1983-84 have been transposed to the 1982-83 appendices, as indicated below:

Queen's: A iii) uses B iii) categories under *Professional Societies*
- Applied Science, Arts and Science, Commerce, Education, Law, Medicine, Nursing, Phys. Ed., Rehab. Therapy.

A v) uses B v) categories under *Consumable Supplies*
- Fine Arts, Nursing, Phys. Ed.

A vi) uses B vi) categories under *Lab & Equipment*
- Medicine, Nursing, Phys. Ed., Rehab. Therapy

A x) uses B x) categories under *Travel*
- Commerce, Education (Outdoor), Fine Arts, Law, Medicine, Nursing, Phys. Ed., Rehab. Therapy

Trent: A vi) uses B vi) categories under *Lab & Equipment*
- Biology, Chemistry, Environmental Studies

Waterloo: A iii) uses B iii) categories under *Professional Societies*
- Architecture, Arts, Engineering, Environmental Studies, Human Kinetics, Phys. Ed., Mathematics, Optometry, Science.

Waterloo: A x) uses B x) categories under *Travel*
- Architecture, Biology, Earth Science, Civil Engineering, Geography, Human Kinetics, Planning.

Western: A x) uses B x) categories under *Travel*
- Biology, Geology, Zoology

Windsor: A iii) uses B iii) categories under *Professional Societies*
- Business Administration, Dramatic Arts, Education, Engineering, Human Kinetics, Phys. Ed., Law, Nursing, Social Science, Social Work, Visual Arts.

h) Enrolment by year in the case of the programs listed below is approximate:

Appendix B: 1983-84

Guelph:	B viii)	— *Laundry* - Vets I-IV	- 120/year
McMaster:	B iv)	— *Co-op Placement*	- 50/term
Ottawa:	B vii)	— *Manuals and Duplication*	- 1,500/year
Queen's:	B v)	— *Consumable Supplies*	
		- Medicine I-IV	- 75/year
		- Fine Art - Sculpture	- 75/year
		- Print Making	- 75/year
	B vi)	— *Lab & Equipment*	
		- Medicine I & II	- 75/year
		- Nursing I	- 70/year
		- Phys. Ed. III-IV	- 125/year
	B viii)	— *Laundry*	
		- Education (Outdoor)	- 25/year
		- Medicine I-IV	- 75/year
		- Nursing I	- 70/year
		- Phys. Ed. III & IV	- 125/year
		- Rehab. Therapy II-IV	- 150/year
	B x)	— *Travel*	
		- Commerce	- 736/year
		- Education	- 599/year
		- Fine Arts III	- 25/year
		- Law	- 451/year
		- Medicine IV	- 75/year
		- Phys. Ed.	- 125/year
		- Rehab. Therapy II-IV	- 50/year
Waterloo:	B viii)	— *Laundry*	
		- Human Kinetics	- 40/year
Western:	B ix)	— *Kits*	
		- Dentistry	- 56/year

NOTE: Numbered footnotes follow the appendices

Appendices

Appendix A i)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Registration

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
REGISTRATION:																
Engineering									*$100°							
Internship													$50°			
Medicine												$50°				
Spanish (Year Abroad)										$35-150°						

*Indicates fees which were initiated by students. Alls other fees shown were either not student-initiated or their origin is unknown.

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix A ii)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Music & Studio Related

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
MUSIC & STUDIO RELATED:																
Architecture											$20§					
Drama (Audition)									$10°							
Film (Screening)									$15†							
Fine Arts									$20°				$25†			
Music (Instrument)									$30-35°		$60§	$100°				
(Private Lessons)												$390°				
Theatre I (Acting)																$55°

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix A iii

Undergraduate Program-Specific Ancillary Fees: 1982-83
Professional Societies

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
PROFESSIONAL SOCIETIES:																
Applied Science								$5-33°								
Architecture											$4-11°					
Arts											$4-11°					
Arts & Science								$5-33°								
Business Administration														$4-13°		
Colleges & Programs									$5-35°							
Commerce								$5-33°								
Dramatic Arts														$4-13°		
Education								$5-33°						$4-13°		
Engineering						$2-15°					$4-11°			$4-13°		
Environmental Studies											$4-11°					
Human Kinetics											$4-11°			$4-13°		
Law								$5-33°						$4-13°		
Mathematics											$4-11°					
Medicine						$2-15°		$5-33°								
Nursing						$2-15°		$5-33°						$4-13°		
Optometry											$4-11°					
Physical Education								$5-33°								
Rehabilitation Therapy								$5-33°								
Science											$4-11°					
Social Science														$4-13°		
Social Work														$4-13°		
Visual Arts														$4-13°		

Legend indicating fee charges: ° = program by year * = program by term † = course by year ‡ = course by term

Appendix A iv)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Co-op Placement

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
CO-OP PLACEMENT:																
Co-op						$90¶					$105¶		$200°			

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix A v)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Consumable Supplies

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's[1]	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
CONSUMABLE SUPPLIES:																
Administrative Studies																
Biology		$25†													$22†	
Communication Arts							$10-50†									
Computer Science																
Education				$10-25†											$100°	
Engineering					$20†										$5-15†	
Film/Photo I																
II (Film)																$329°
III (Film)																$375°
IV (Film)																$700°
II (Photo)																$1500°
III (Photo)																$15°
IV (Photo)																$370°
II (Photo)																$530°
III & IV (Photo)																$37°
III & IV (Media)																$15°
																$15°

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix A v) continued

Undergraduate Program-Specific Ancillary Fees: 1982-83
Consumable Supplies

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
Fine Arts								$8-15β							$25-145†	
Geography															$3-50†	
Graphic Arts I-III																$165°
Interior Design I																$45°
II																$40°
III																$20°
IV																$15°
Journalism I																$25°
I-III																$30°
Library Technology				$10-20†												
Medicine									$30°							
Nursing								$15-30°								
Physical Education															$150-200°	
Science					$20†										$4-60†	
Sports Administration					$20†											
Theatre I-III (Tech/Prod)																$25°
Visual Arts							$10-50†									

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term β = course by month

Appendix A vi)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Lab & Equipment

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
LAB & EQUIPMENT																
Architecture		$350°														
Biology		$9†								$3-20†						
Chemistry										$3-20†						
Computer Science		$9†														
IV															$50†	
Comp. Sci. & Lab. courses					$20†											
Environmental Studies										$3-20†						
Fashion I																$31°
II																$13°
III (Design)																$19°
III (Merchdsng.)																$6°
Fine Arts							*$50-200†									
Food/Nutrn., Consumer/ Family I																$15°
III & IV																$10°
Geology		$9†														
Hospitality/Trsm. II & III																$95°
Medicine								$30-150°								
Natural Sciences															$10†	
Nursing								$30-150°								
Physical Education								$30-150°								
Rehabilitation Medicine									$25°							
Rehabilitation Therapy								$30-150°								
Secretarial/Admin. I-IV																$10°

*Indicates fees which were initiated by students. All other fees shown were either not student-initiated or their origin is unknown.

Legend indicating fee charges: ° = program by year ‡ = program by term † = course by year § = course by term

Appendix A vii)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Manuals & Duplication

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
MANUALS & DUPLICATION:																
Biology		$5†								$3-12†						
IV										$50†						
Chemistry		$5†								$3-12†						
Computer Science		$10†														
Engineering							$8†									
Hospitality/Trsm. I																$20°
II																$29°
III																$15°
IV																$10°
Law														$70°		
Mathematics		$10†														
Physics										$3-12†						
Science							$8†		$16†							
Statistics		$10†														

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix A viii)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Laundry

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
LAUNDRY:																
Clinical Education						$75°										
Education (Outdoor)								$20-80°								
Fine Arts								$20-80°								
Health Sciences								$20-80°								
Medicine								$120°	$30-100°							
Physical Education								$115°								
Phys.Ed./Sports Admin.					$10°											
Science								$20-80°								
Veterinary Medicine			$20-82°													

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix A ix)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Kits

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
KITS:[2]																
Dentistry									$277-1,674°			$130-2,550°				
Electrical Tech. I																$75°
I																$45°
II																$30°
III																$100°
III																$50°
Interior Design I																$384°
Medicine						$500°		$360°								

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix A x)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Travel

FEE TYPE	Brock	Carleton³	Guelph	Lkhd.⁴	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
TRAVEL:																
Anthropology									$20†							
Applied Geography I																$15°
II																$25°
III																$80°
Architecture											$9-100†					
Biology		$150†							$268†	$5-550†	$9-250†	$40-150†				
Commerce								$25-180°								
Earth Science											$9-250†					
Education (Outdoor)								$180°								
Engineering (Civil)											$9-100†			$40†		
(Degree)				$100°												
(Technology)				$100°												
Fine Arts								$25-180°								
Forestry (Degree) I-III				$100°												
(Degree) IV				$190°												
(Technology)				$100°												
Geography										$5-150†	$9-100†					
Geology		$150†				$100†						$40-150†		$150†		
Human Kinetics											$9-100†			$25-50†		
Journalism		$140†														
Law								$25-180°								
Library Technology				$100°												
Medicine								$25-180°								
Nursing				$100°				$25-180°								

Appendix A x) continued

Undergraduate Program-Specific Ancillary Fees: 1982-83
Travel

FEE TYPE	Brock	Carleton[3]	Guelph	Lkhd.[4]	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
Outdoor Recreation				$100°												
Physical Education				$100°				$25-180°	$54°							
									$78°							
Planning											$9-100†					
I-IV																$200°
Rehabilitation Therapy								$25-180°								
Zoology												$40-150†				

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix A xi)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Other

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
OTHER:																
French & German (Yr. Abroad Activity)										$250°						
Veterinary Medicine (Rabies)			$21-63°													

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B i)

Undergraduate Program-Specific Ancillary Fees: 1983-84
Registration

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto§	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
REGISTRATION:																
Bachelor Bus. Admin.															$10x231¶	
Engineering									*$100x2,600°							
Internship													$52x60°			
Medicine												$50x430°				
Spanish (Year Abroad)										$ 40x8°						
										$150x8°						
Erindale College									$33x3,891°							
Innis College									$28x831°							
New College									$19x2,123°							
St. Michael's College									$129x2,567°							
Scarborough College									$30x3,696°							
Trinity College									$160x1,008°							
University College									$15x2,395°							
Victoria College									$120x2,474°							
Woodsworth College									$2x493°							
SUB-TOTALS:																
Revenue									$1,389,102	$1,520		$21,500	$3,120		$2,310	
# Student Payments									22,078	16		430	60		231	
Average Payment									$63	$95		$50	$52		$10	

*Indicates fees which were initiated by students. All other fees shown were either not student-initiated or their origin is unknown.

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B ii)

Undergraduate Program-Specific Ancillary Fees: 1983-84
Music & Studio Related

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo*	Western	WLU	Windsor	York	Ryerson
MUSIC & STUDIO RELATED:																
Architecture											$60x500†					
Drama									$30x52†							
Fine Arts											$2x56§					
											$5x35§					
											$10x545§		$13x110§			
									$20x39§		$15x115§					
									$40x20§		$25x23§					
									$45x31§		$27x31§					
											$30x42§					
Humanities									$20x98†							
Music	$10x66†															
	$20x16†															
	$25x21†															
(Instrument Fee)									$35x112§		$60x30†	$105x500°				
(Private Lessons)												$410x25°				
(Score Rental)									$35x18°							
Theatre I (Dance-Audition)																$15x18°
SUB-TOTALS:																
Revenue	$1,505								$11,045		$41,934	$62,750	$1,430			$270
# Student Payments	103								370		1,377	525	110			18
Average Payment	$15								$30		$30	$120	$13			$15

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B iii)

Undergraduate Program-Specific Ancillary Fees: 1982-83
Professional Societies

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto[7]	Trent	Waterloo[8]	Western	WLU	Windsor	York	Ryerson
PROFESSIONAL SOCIETIES:																
Applied Science								*$18x1,690°								
Architecture									*19x386°		$10x339‡					
Arts											*$5x2,884‡					
Science											*$8x2,230‡					
Arts and Science								*$7x5,328°	*$5x11,891°							
Business Admin.														*$6x1,469°		
Commerce								*$28x736°								
Dentistry									*$22x483°							
Dramatic Arts														*$10x65°		
Education								*$7x599°	*$4x380°					*$4x380°		
Engineering						$10x1,350°			*$22x2,640°		*$11x3,957¶			*$16x781°		
Environmental Studies											*$ 4x1,267¶					
Forestry									*$23x239°							
Law								*$37x451°	*$40x462°					*$12x395°		
Mathematics										*10x3,865¶						
Medicine						$20x300°		*$35x301°	*$29x985°							
Music									*$15x374°							
Nursing						$10x350°		*$8x234°	*$21x381°					*$20x297°		
Optometry											*$4x233¶					
Pharmacy									*$30x646°							
Physical Education								*$7x281°	*$10x442°		*$6x1,406¶			*$10x243		
Rehab. Therapy								*$6x193°	*$20x317°							
Social Science														*$5x1,802°		
Social Work														*$10x353		
Visual Arts														*$10x86		
SUB-TOTALS:																
Revenue						$23,000		$124,736	$249,366		$132,263			$49,990		
# Student Payments						2,000		9,813	20,280		$16,181			5,871		
Average Payment						$11		$13	$12		$8			$9		

*Indicates fees which were initiated by students. All other fees shown were either not student-initiated or their origin is unknown.

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year ‡ = course by term

Appendix B iv)

Undergraduate Program-Specific Ancillary Fees: 1983-84
Co-op Placement

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
CO-OP PLACEMENT:																
Co-op Placement						$90x50‡			$21x62†		$110x8,800¶		$210x319°			
SUB-TOTALS:																
Revenue						$4,500			$1,302		$968,000		$66,990			
# Student Payments						50			62		8,800		319			
Average Payment						$90			$21		$110		$210			

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B v)

Undergraduate Program-Specific Ancillary Fees: 1983-84
Consumable Supplies

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York*	Ryerson
CONSUMABLE SUPPLIES:																
Administrative Studies															$100x230†	
Biology										$25x10°						
Communications							$10x124†									
							$15x93†									
							$20x136†									
							$45x133†									
Computer Science		$4x167°														
		$10x39°														
Comp. Sci. & Lab. courses					$20x810†											
Cultural Studies										$40x20°						
Education				$10x224†											$5x1,000†	
				$20x35†												
				$25x16†												
Environmental Studies										$10x24°						
Film/Photo. II-IV																$ 15x147°
II (Photo)																$ 37x63°
I																$329x156°
III (Photo.)																$370x21°
II (Film)																$375x42°
IV (Photo.)																$530x21°
III (Film)																$700x42°
IV (Film)																$1,500x42°
Fine Arts															$10x143†	
								$15x77 β							$300x722†	
Geography								$8x161 β		$3x206°						
										$5x75°						
Graphic Arts I-III																$173x115°

Legend indicating fee charges: ° = program by year * = program by term † = course by year § = course by term β = course by month

Appendix B v) continued

Undergraduate Program-Specific Ancillary Fees: 1983-84
Consumable Supplies

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York¶	Ryerson
Interior Design I																$45x66°
II																$40x51°
III																$20x55°
IV																$15x68°
Journalism I-III																$25x94°
Library Technology				$10x20°												
Nursing I								$15x65°								
II								$30x63°								
III								$15x59°								
IV								$25x48°								
Theatre I-III																$50x70°
Visual Arts							$25x315†									
							$30x45†									
	$45x93†						$50x591†									
SUB-TOTALS:																
Revenue	$4,185	$1,058		$3,540	$16,200		$50,115	$7,393		$2,283					$246,030	$223,285
# Student Payments	93	206		295	810		1,437	474		335					2,095	1,353
Average Payment	$45	$5		$12	$20		$35	$16		$7					$117	$165

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B vi)

Undergraduate Program-Specific Ancillary Fees: 1983-84
Lab & Equipment Fees

FEE TYPE	Brock	Carleton	Guelph	Lkd.	Lrtn.	McMaster	Ottawa[10]	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York[9]	Ryerson
LAB & EQUIPMENT:																
Arts															$25x100†	
Astronomy									$10x23†							
Biology									$10x257§	$12x155†	$10x124†					
									$10x88†							
									$20x4,031†							
Botany									$10x50§							
									$20x27†							
									$20x330†							
Chemistry									$10x202§	$6x121†	$10x2,833†					
									$10x29†	$11x108†						
									$20x3,741†	$25x243†						
Civil Tech. I-III																$25x334°
Computer Science									$10x465§							
Comp. Sci. & Lab. crs.					$20x2,267†											
Earth Science I											$12x245°					
II-IV											$20x350°					
									$10x203§							
									$10x2†							
									$20x54†							
Environmental St.										$10x52†						
Fashion I																$25x130°
II (Merchd'ng)																$10x52°
II (Design)																$20x52°
III (Merchd'ng)																$13x25°
III (Design)																$15x25°

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B vi) continued

Undergraduate Program-Specific Ancillary Fees: 1983-84
Lab & Equipment Fees

FEE TYPE	Brock	Carleton	Guelph	Lkd.	Lrtn.	McMaster	Ottawa[10]	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York[9]	Ryerson
Fine Arts							$135x301°									
Food/Nutrtn., Consumer/Family															$45x1,100†	
I, III & IV																$15x247°
II																
Geography																$20x80°
									$10x59§		$10x33†					
		$15x105†							$10x10†		$15x307†					
									$20x85†		$20x260†					
Geology											$25x10†					
									$10x821§							
									$10x102†							
Hospitality/Trsm. II&III									$20x67†							
Medicine																$100x269°
									$10x119§			$60x210°				
									$10x161†							
									$20x747†							
I								$360x75°								
II								$80x75°								
Microbiology/Zoology									$20x68†							
Molecular Genetics/Biology									$20x35†							
Neurophysiology									$10x6†							
Nursing I								$55x70°								
Physical Education III&IV								$35x125°								
Physics									$10x104§							
									$10x109†							
									$20x1,765†							

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B vi) continued

Undergraduate Program-Specific Ancillary Fees: 1983-84
Lab & Equipment Fees

FEE TYPE	Brock	Carleton	Guelph	Lkd.	Lrtn.	McMaster	Ottawa[10]	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York[9]	Ryerson
Physics/Archaeology									$20x7†							
Planning									$60x125°							
Psychology									$10x458§							
									$20x188†							
Rehabilitation Therapy								$40x193°								
Secretarial/Admin. I-IV																$10x760°
Survey Science									$10x234§							
									$10x51†							
									$20x28†							
									$20x78†							
									$10x70§							
									$10x14†							
									$20x688†							
SUB-TOTALS:																
Revenue		$1,575			$45,340		$40,635	$48,945	$274,880	$10,369	$57,395	$12,600			$52,000	$54,910
# Student Payments		105			2,267		301	538	15,576	679	4,287	210			1,200	2,223
Average Payment		$15			$20		$135	$91	$18	$15	$13	$60			$43	$25

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B vii)

Undergraduate Program-Specific Ancillary Fees: 1983-84
Manuals & Duplication

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
MANUALS & DUPLICATION																
Biology		$10x357†								$2x180°						
										$3x45°						
		$5x143§								$4x91°						
Chemistry										$7x77°						
Hospitality/Tourism I										$6x250°						
Law																$50x182°
Physics										$2x170°				$70x395°		
										$3x85°						
										$4x85°						
Science & Engineering							$6x1,500†									
SUB-TOTALS:																
Revenue		$4,835					$9,000			$3,833				$27,650		$9,100
# Student Payments		500					1,500			983				395		182
Average Payment		$9					$6			$4				$70		$50

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B viii)

Undergraduate Program-Specific Ancillary Fees: 1983-84
Laundry

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
LAUNDRY:																
Clinical Education						$75x100°										
Education (Outdoor)								$110x25°								
Human Kinetics/Leis. Stud.											$10x40°					
Medicine I								$ 40x75°								
II								$120x75°	$ 25x245°							
III								$120x75°	$ 75x251°							
IV								$ 90x75°	$100x238°							
Nursing I								$120x70°								
II & III								$100x114°								
IV								$ 50x50°								
Phys. Ed./Sports Admin.					$10x320°											
Physical Education I & II								$ 50x156°								
III & IV								$ 50x125°								
Rehabilitation Therapy I								$180x45°								
II-IV								$ 60x150°								
Veterinary Medicine I&II			$ 30x240°													
III			$ 80x120°													
IV			$110x120°													
SUB-TOTALS:																
Revenue			$30,000		$3,200	$7,500		$83,950	$48,750		$400					
# Student Payments			480		320	100		1,035	734		40					
Average Payment			$62		$10	$75		$81	$66		$10					

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B ix)

Undergraduate Program-Specific Ancillary Fees: 1983-84
Kits

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York	Ryerson
KITS:‡																
Dentistry I									$2,058x103°			$2,410x56°				
II									$1,368x111°			$2,765x56°				
III									$ 392x119°			$1,130x56°				
IV									$ 287x117°			$ 170x56°				
Electrical Tech. I																$200x250°
II																$ 90x256°
III																$145x206°
Interior Design I																$305x66°
Medicine						$500x100°		$360x75°								
SUB-TOTALS:																
Revenue						$50,000		$27,000	$444,049			$362,600				$123,040
# Student Payments						100		75	450			224				778
Average Payments						$500		$360	$987			$1,619				$158

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year ‡ = course by term

Appendix B x)

Undergraduate Program-Specific Ancillary Fees: 1983-84

Travel

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo[11]	Western	WLU	Windsor	York*	Ryerson
TRAVEL:																
Applied Geog. I & III																$30x100°
III																$100x31°
Architecture											$260x65§					
IV									$108x44°							
									$175x15°							
Arch/Landscape Arch. I									$ 60x60°							
Biology		$135x7°							$215x14†	$10x13†	$95x24†	$40x30†				
									$245x11†	$600x15†	$425x10†					
Commerce								$40x736°								
Earth Science											$70x50†					
Ecology															$65x95†	
Education								$180x599°								
Engineering (Civil)											$90x140†			$50x30†		
(Degree)				$10x284°												
(Tech.)				$10x290°												
Fine Arts III								$165x25°								
Forestry (Degree)									$ 35x52°							
(Degree)									$ 45x28°							
(Degree)									$170x39°							
(Degree)									$260x46°							
(Degree)									$340x45†							
(Degree) I				$ 55x79°												
(Degree) II				$ 80x69°												
(Degree) III				$155x55°												

Legend indicating fee charges: ° = program by year * = program by term † = course by year § = course by term

Appendix B x) continued

Undergraduate Program-Specific Ancillary Fees: 1983-84

Travel

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo[11]	Western	WLU	Windsor	York[9]	Ryerson
Forestry (Degree) IV				$200x57°												
(Tech.) I				$ 55x79°												
(Tech.) II				$ 80x71°												
Geography		$125x78°					$125x60†			$ 2x27†	$ 45x17†				$65x25†	
							$155x30†			$ 5x35†	$110x44†					
										$ 8x50†						
										$150x8†						
										$500x27†						
Geography III									$90x14°							
Geology	$200x11°	$150x21°				$100x50†						$130x51†		$150x20†		
		$175x52°														
II									$200x55°							
III									$250x49°							
Human Kinetics											$ 3x53§			$25x30†		
											$110x26§					
											$160x35§					
Journalism		$125x40°														
Law								$180x451°								
Library Tech. I				$ 20x17°												
II				$125x11°												
Medicine IV								$135x75°								
Nursing				$ 35x182°				$180x234°								
Outdoor Rec. I-IV				$ 95x208°												
Physical Education				$ 25x158°				$ 60x125°								

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B x) continued

Undergraduate Program-Specific Ancillary Fees: 1983-84
Travel

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo11	Western	WLU	Windsor	York*	Ryerson
Planning											$10x140†					$200x249°
											$60x55†					
Recreology							$225x11†									
Rehabilitation Therapy II & III								$180x100°								
IV								$120x50°								
Sociology															$2x40†	
Zoology												$150x104†				
SUB-TOTALS:																
Revenue	$2,200	$27,945		$77,350		$5,000	$14,625	$306,310	$78,162	$24,459	$59,895	$23,430		$5,250	$7,880	$55,900
# Student Payments	11	198		1,560		50	101	2,395	472	175	1,136	185		80	160	380
Average Payment	$200	$141		$50		$100	$145	$128	$166	$140	$53	$127		$66	$49	$147

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendix B xi)

Undergraduate Program-Specific Ancillary Fees: 1983-84
Other

FEE TYPE	Brock	Carleton	Guelph	Lkhd.	Lrtn.	McMaster	Ottawa	Queen's	Toronto	Trent	Waterloo	Western	WLU	Windsor	York*	Ryerson
OTHER:																
Arts & Sci. (Computer)															$50x1,500†	
Vet. Meds. I-IV (Rabies)			$50x475°													
French & German (Yr. Abroad Activity)										$250x25°						
SUB-TOTALS:																
Revenue			$23,750							$6,250					$75,000	
# Students Payments			475							25					1,500	
Average Payment			$50							$250					$50	

Legend indicating fee charges: ° = program by year ¶ = program by term † = course by year § = course by term

Appendices A and B
Undergraduate Program-Specific Ancillary Fees: 1982-1983 and 1983-84

Numbered Footnotes

1. *Queen's: Consumable Supplies - In Fine Arts, students enrolled in print-making and sculpture courses are charged materials fees of $15 per month and $8 per month, respectively, for those months in which students use these materials. There were a total of 77 student months charged for print-making materials with a course enrolment of 75 students in 1983-84. There were 161 student months charged for sculpture materials with a course enrolment of 75 students in 1983-84.*
2. *Ottawa, Toronto, Western: Kits* - Medical kit charges are not reported as compulsory ancillary fees by Ottawa, Toronto and Western, while they are reported as such by McMaster and Queen's.
3. *Carleton: Travel* - The $150 charge shown for Biology and Geography is the average cost to students per course in these disciplines, with optional costs in Biology ranging up to $700.
4. *Lakehead: Travel* - The average payment per year for most students in the disciplines listed, with the exception of Forestry IV as shown, is $100.
5. *Toronto: Registration* - College registration fees listed entail the following charges:

   Erindale - Student Union ($27.75) and Scholarship Fund ($5)
   Innis - Student Council ($27) and Innis Foundation ($1)
   New - Student Council ($19)
   St. Michael's - Student Union ($19), Library ($55) and Student Centre ($55)
   Scarborough - Student Council ($20) and Library ($10)
   Trinity - Student Union ($160.50)
   University - Literary and Athletics Society ($15)
   Victoria - Student Administrative Council ($28), Wymilwood Student Union ($37) and Library ($55)
   Woodsworth - Student Association ($2)
6. *Waterloo: Music & Studio Related* - Fine Arts fees were categorized as lab fees by Waterloo in an addendum to their submission for this survey; however, in terms of the categories used here and because of the nature of these fees they are displayed under the Music & Studio Related rubric.
7. *Toronto: Professional Societies* - The Arts and Science fee of $5 is charged by the following colleges - Innis, New, St. Michael's, Trinity, University, Victoria and Woodsworth. Architecture includes Landscape Architecture.
8. *Waterloo: Professional Societies* - The fees indicated are charged per term with the enrolment totals shown including both the Falls and Winter counts.
9. *York: Consumable Supplies, Lab & Equipment, Travel, and Other* - Enrolment totals are estimates and include part-time students.
10. *Ottawa: Lab & Equipment* - The Fine Arts fee of $135 is the approximate average payment per student within a range which extends from $50 to $200.
11. *Waterloo: Travel* - The Architecture fee charge varies annually depending on the location chosen for field trips. The Human Kinetics fee shown represents only partial travel costs, with the university absorbing the balance.

84-II Graduate Program Funding - Visual Arts (MFA), University of Windsor; Industrial Relations (MIR) Queen's University

While it is Council's intention to move to a format whereby it offers advice on program funding to the Minister on an annual basis rather than several times a year, it appears that this format will have to be phased in. At the time Advisory Memorandum 83-VIII was accepted by the Minister, nine programs were being reviewed by Council's Academic Advisory Committee. In this memorandum, Council offers advice on two of these programs. Of the remaining seven programs, several, though only relatively recently submitted to Council, have been in existence since the 1970s. Council hopes to be in a position to offer advice on these early in the fall of this year, and so clear the backlog of programs.

Visual Arts (MFA), University of Windsor

Council has reviewed the advice of its Academic Advisory Committee regarding the University of Windsor's new master's program in Fine Arts.[1] This program meets all of Council's interim funding criteria for new graduate programs. Because of the unique orientation of the program, the employment opportunities available for its graduates and the continuing student demand for the program, formula funding support should be committed even in a time of economic constraint.

Accordingly, Council *recommends to the Minister:*

OCUA 84-3
FUNDING FOR THE MASTER'S PROGRAM IN VISUAL ARTS AT THE UNIVERSITY OF WINDSOR FOR 1986-87

THAT the MFA program in Visual Arts at the University of Windsor be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1984-85 on, be included in the moving average for the university.

Industrial Relations (MIR), Queen's University

Council has examined the advice of its Academic Advisory Committee with respect to Queen's University's new master's program in Industrial Relations.[2] Council finds that the program meets all of Council's interim funding criteria for new graduate programs. Even in a time of economic constraint formula funding should be made available, especially because of the pressing need for highly trained industrial relations' practitioners and because the Queen's program will complement rather than duplicate the University of Toronto's program.

Accordingly, Council *recommends to the Minister*:

OCUA 84-4
FUNDING FOR THE MASTER'S PROGRAM IN INDUSTRIAL RELATIONS AT QUEEN'S UNIVERSITY FOR 1986-87

THAT the MIR program in Industrial Relations at Queen's University be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1985-86 on, be included in the moving average for the university.

M. Paikin
Chairman

June 15, 1984

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[1] See Appendix A.
[2] See Appendix B.

Appendix A

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Master's Program in Visual Arts (M.F.A.), University of Windsor —
New Graduate Program considered for Formula Funding

On April 20, 1983, the University of Windsor requested that Council consider for funding approval its new graduate program in Visual Arts. Council referred the matter to its Academic Advisory Committee.

The Committee reviewed the program in light of four of Council's funding criteria for new graduate programs. Council, of course, must apply the fifth criterion itself — whether the program is deserving of funding even in a time of economic constraint.

1. ACADEMIC APPRAISAL

The Council of Ontario Universities (COU) has certified that the program has passed a rigorous appraisal and at the time of appraisal did not require any improvements.

2. NEED

The Committee particularly focused on the question of the need for this program. In a requested supplementary submission the University of Windsor made a convincing case for the need for the program.

In 1983, thirty students applied for the four first-year positions available. This is three times the number that applied in the initial year of the program (1979). Of the 10 graduates from the program, six have found employment in art-related occupations and all have pursued their careers as exhibiting artists. Employment opportunities for graduates are available in galleries, museums, secondary schools, community colleges and graphic art-related occupations. The Committee is satisfied that there is a societal need for graduates of this program.

3. UNIQUENESS

The only other Visual Art program in Ontario is at York University. The Windsor program is more traditional and structured than the York program, which is geared to individual study concentrating intensively on studio production. The York program is more experimental in nature.

The Committee believes that both approaches to the discipline are equally valid. Some students will find the York program suitable, while for others Windsor's approach will better meet their needs. None of the students currently enrolled at Windsor applied to York.

The Committee is satisfied that the Windsor program in Visual Arts is unique.

4. AIMS, OBJECTIVES AND EXISTING STRENGTHS

Windsor established a Fine Arts undergraduate program in 1968. Approximately $350,000 has been spent by the university in order to remodel its Fine Arts building and to make needed library and equipment purchases for the Fine Arts program.
Planning for a graduate program began in the early 70's and in 1976 Senate designated Fine Arts as one of the university's strengths. The university is about to make further commitments to renovate the Fine Arts building and to include a facility for photography. As well, all students in the program have either received internal bursary or scholarship support or hold positions as teaching assistants.

The Committee believes that this new graduate program is, therefore, consistent with the aims, objectives and existing strengths of the University of Windsor. It has been included in the institution's five-year graduate plans.

5. FUNDING

The Committee, therefore, recommends to Council that:

> the master's program in Visual Arts at the University of Windsor be recommended by Council as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
May 10, 1984

Appendix B

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Master's Program in Industrial Relations (M.I.R.), Queen's University —
New Graduate Program considered for Formula Funding

On December 21, 1983, Queen's University requested that Council consider a proposal for funding approval of its new graduate program in Industrial Relations. Council then referred the proposal to this Committee for advice.

The program was reviewed in light of Council's four funding criteria for new graduate programs, and the question of institutional appropriateness was also addressed. The Committee's findings are summarized below.

1. ACADEMIC APPRAISAL

The Council of Ontario Universities (COU) has certified that the program has passed a rigorous academic appraisal and at the time of appraisal did not require any improvements.

2. NEED

In assessing the need for the program, the Committee reviewed a survey conducted in 1979-80, *Professionalism in the Canadian P/IR Function* (Queen's Industrial Relations Centre, 1980), which was supported by the Government of Canada's Department of Labour. Some 600 personnel and industrial relations practitioners across Canada were surveyed. The major finding of the study was the indication that the current practitioners felt underqualified for the tasks which they had to perform. The Committee is convinced that because of the following factors there is a societal need for graduates of a master's program in industrial relations:

a) the growing importance of industrial relations and human resource management in Canada;
b) (the) upgrading of this function in private and public organizations;
c) great expansion in (the) scope and complexity of the subject matter dealt with by people in the industrial relations area;
d) dramatic increase in the range of employment situations involved in, and the coverage of, collective bargaining;
e) emerging recognition of the importance of human resource planning and utilization as a key determinant of organizational effectiveness and economic growth;
f) impending large number of retirements among individuals currently occupying professional industrial relations positions, and;
g) recognition that this emphasis on human resources is likely to strengthen during the next decade due to significant demographic, technologic and other related changes, such as the restructuring of the labour force, the coming shortage of youth, the bunching of workers in the 35-44 year age group, the growing number of older workers, the issue of retirement, and the continuous expansion of female employment.[1]

The Committee is satisfied that these factors will produce a continuing demand for advanced-level industrial relations specialists in teaching, research and policy-making areas.

Student demand for the program is evidenced by the fact that there were 37 qualified applicants and 71 applicants in total for the 1983-84 academic year.

The Committee is, therefore, satisfied that there is a need, both provincial and national, for graduates of this program.

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1. *Request for Formula Support for the Master's Program in Industrial Relations (M.I.R.) at Queen's University*, Queen's University, 1983, pp.5-6.

3. UNIQUENESS

In Ontario, there is only one other master's program in Industrial Relations. This program (at the University of Toronto) is a two-year, all-course program. The major areas of focus are: unions and collective bargaining; labour markets and human resource policy; and personnel and organizational behaviour. The Queen's program on the other hand is a one-year program, with required course-work and a major research essay.

The academic focus of the program at Queen's is on labour law, labour economics and the management of human resources. The one-year program allows current industrial relations practitioners to arrange a one-year leave of absence in order to take the program. Some individuals have already made such arrangements and are enrolled in the program.

The Committee is satisfied that the Queen's program is distinctive and also that there is a need for a second program in this field. The Toronto program had 19 students enrolled in 1982-83 and received 125 applications. Queen's plans to achieve a steady-state enrolment of 30 students.

4. AIMS, OBJECTIVES AND EXISTING STRENGTHS

This is a multi-disciplinary program involving the Department of Economics, the School of Business and the Faculty of Law, as well as the forty-four year old Industrial Relations Centre. Queen's enjoys an international reputation in Industrial Relations research. This program builds upon the institution's established strengths in industrial relations and draws upon the resources of several other strong academic units. As well, Queen's has built up over the years Canada's largest specialized collection of industrial relations materials.

The Committee believes that this new graduate program in industrial relations is consistent with the aims, objectives and existing strengths of the institution. It has been included in the institution's five-year graduate plans.

5. FUNDING

The Committee, therefore, recommends to Council that:

> the master's program in Industrial Relations at Queen's University be recommended by Council as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
May 10, 1984

84-III Government Support of the University System in 1985-86

The recommendations in this Memorandum for Government funding of the Ontario university system in 1985-86 are estimated to be the minimum necessary to allow the institutions to maintain the level of service provided in 1984-85. Council's recommendations covering its basic funding objectives do not include the amount (or any portion of the amount) that would be required to recoup the cumulative shortfall in funding during recent years, and are based solely on 1984-85 levels of funding and service. Council feels that there should not be any further erosion of the level of service in 1985-86 and that the funding increase in 1985-86 should be as recommended herein in order to ensure that this will be the case.

Government Support in Perspective

During the period in which Council's funding advice has not been accepted (1978-79 to 1984-85), the universities' share of total Government budgetary expenditures (excluding debt servicing) will have declined by about 16%, while university enrolment is expected to increase by about 18%. If the universities' share of total Government budgetary expenditures (excluding debt servicing) had been maintained at the 1977-78 level, the last year Council's funding advice was accepted, the universities would have received an additional $190 million in operating grants in 1984-85 alone.

In Advisory Memorandum 83-IX, Council estimated that Government support of the Ontario university system would fall $9.0 million short of meeting Council's basic funding objectives for 1984-85 and $21.7 million short of Council's recommendation for total operating support. Council has recalculated the cost of its basic funding objectives using current estimates of inflation and enrolment change and the actual revenue available for 1984-85. Incorporated in these recalculations is: i) an increase in the estimated increase in enrolment from 2.8% to 3.1%; ii) an increase of $4.4 million in estimated formula fee revenue; iii) an increase of $4.7 million in estimated other fee revenue; and iv) an increase of $1.5 million in estimated other revenue. Council now estimates that Government support will be about $1.5 million short of the university system's basic funding requirements in 1984-85[1]. In addition, Government did not accept Council's advice to provide $12 million for additional equipment and library acquisitions. As a result, the estimated total operating revenue available to the university system in 1984-85 falls $13.5 million short of Council's revised total recommendation for operating support.

Calculation of Funding Requirements for 1985-86

Having placed, in the preceding section, the existing level of government support in perspective, Council now proceeds to outline its calculations of the requirements for 1985-86.

a) *Basic Funding Objectives for 1985-86*

Council continues to believe that the basic funding objectives used in the past should be met in 1985-86. These objectives are: (1) to offset inflationary trends, (2) to maintain levels of service, and (3) to adjust for predicted enrolment change.

b) *Cost of Basic Funding Objectives for 1985-86*

The method for costing Council's basic funding objectives for 1985-86 and the factors used to calculate the funds required, both of which are similar to those used in previous years, are outlined below.The results are documented in Table I.

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[1] In accordance with the Minister's acceptance of OCUA recommendation 79-12, revenue received from additional optional fees is not taken into consideration in this memorandum. See Appendix A for a description of the shortfall calculation.

Table I

The Cost of the Basic Funding Objectives for 1985-86
($ Million)

	1	2	3	4	5	6	7
	1984-95 Base	Inflationary Trend Costs	Service Level Costs	Efficiency/ Rationalization	Predicted Enrolment Change	Stabilization Factor	Cost of Basic Objectives
Expenditures							
Salaries and Fringe Benefits	1,234.0	75.3	18.3	0.0	19.9	(9.9)	1,337.6
Non-Salary	295.0	22.4	0.0	0.0	4.8	(2.4)	319.8
TOTAL	1,529.0	97.7	18.3	0.0	24.7	(12.3)	1,657.4

Notes:

1. Percentage change factors for each column of the table are as follows:

	Salaries and Fringe Benefits	Non-Salary
Column 2:	+ 6.1%	+ 7.6%
Column 3:	+ 1.4%	0.0%
Column 4:	− 0.0%	− 0.0%
Column 5:	+ 1.5%	+ 1.5%
Column 6:	− 50.0% of Column	− 50.0% of Column 5.

2. These factors, except for column 6, are applied to the cumulative total of the previous columns.

(i) The 1984-85 Base (Column 1)

Council's estimate of the financial requirements of the Ontario university system for 1985-86 is calculated by escalating the universities' expenditures in 1984-85 by Council's estimate of the increase in the costs of maintaining the same level of service. In calculating the 1984-85 expenditure base, it is assumed that expenditures in 1984-85 are equal to estimated revenues. As a result, the base does not incorporate the 1984-85 funding shortfall of $1.5 million identified in Appendix A.

On this basis, Council estimates that the 1984-85 base of operating revenue and expenditures of all institutions (the fifteen provincially-assisted universities, the affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College) will be $1,529.0 million. The 1984-85 base expenditures are apportioned according to their corresponding share in the universities' budgets: 80.7% for salaries and fringe benefits and 19.3% for non-salary items.

(ii) Increases in Costs due to Inflation (Column 2)

Council has reviewed forecasts made by several competent authorities of the increase in the Consumer Price Index (CPI) for 1985-86. These projections ranged from 4.1% to 7.5%. Council has used the average of these projections, 6.2%, as its estimate of the increase in CPI.

Normally, Council has used its estimate of the increase in CPI as its salary inflation factor. In revising its funding advice for 1983-84 and 1984-85, in order to reflect the effects of the *Inflation Restraint Act, 1982* (Advisory Memorandum 82-IIIA) and the *Public Sector Prices and Compensation Review Act, 1983* (Advisory Memorandum 83-IVA) on university system costs, Council adjusted its advice to take into account differences between the universities' fiscal year and salary contract periods. For 1983-84, it was estimated that, on average, the 5% wage scale guideline imposed under the *Inflation Restraint Act, 1982* would be in effect for 10.5 months of the 1983-84 university fiscal year. The remaining 1.5 months were covered by existing 1982-83 salary contracts which overlapped into the 1983-84 fiscal year. For the 1984-85 fiscal year, salary contracts for the first 1.5 months were limited by the *Inflation Restraint Act, 1982* to 5%, and salary contracts for the remaining 10.5 months were adjusted to meet the Treasurer's guideline of up to 5% on average compensation under the *Public Sector Prices and Compensation Review Act, 1983*.

For the 1985-86 fiscal year, to be consistent with its 1983-84 and 1984-85 funding advice, Council again takes into account differences between the universities' fiscal year and salary contract period. Hence, Council's salary inflation factor is calculated by: (1) applying the 5% wage scale guideline for 1.5 months of the 1985-86 fiscal year, and (2) applying the 6.2% estimate of the increase in CPI for the remaining 10.5 months of the 1985-86 fiscal year. The resulting factor of 6.1% is applied to the salaries and benefits portion of the base, resulting in an estimated $75.3 million in additional salaries and benefits.[2]

For several years, increases in the prices of non-salary items purchased by universities have exceeded increases in CPI. The annual increase in the Ontario University Non-Salary Price Index (OUNSPI) averaged 22.2% higher than the annual increase in CPI during the period 1976-77 to 1982-83. Council's 1985-86 non-salary inflation factor is derived by increasing the projected 6.2% increase in CPI by the average differential between the increase in OUNSPI and CPI for the period cited. This yields a value of 7.6% which is applied to the base, resulting in an estimated $22.4 million in non-salary inflation costs.

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[2] This increase for salaries and benefits is estimated to be the amount required to maintain base salaries at 1984-85 levels. The increase contains no "catch-up" component.

(iii) Increase in Costs of Maintaining Existing Service Levels (Column 3)

In its 1985-86 funding advice Council again identifies, and makes provision for, the costs of maintaining existing levels of service which are not related to inflation. In recent years, Council has made provision for only one component of these additional costs in its cost of basic objectives, the net cost of providing for progress-through-the-ranks (PTR) for faculty and non-academic staff. This net cost arises from the uneven age distribution of the faculty and non-faculty complement, where the number of people retiring (with higher salaries) and being replaced by younger people (with lower salaries), is not sufficient to provide the total funds required for the normal progress of continuing faculty and staff.

Prior to 1980-81, Council also included under its provision for maintaining existing service level costs an allowance for furniture and equipment replacement. Council has subsequently removed this non-salary service level costs factor from its funding model and has made a separate provision for the restoration of equipment and library collections. Council feels that it must continue to recommend a level of support which will, in time, lead to the restoration of the levels of service in non-salary expenditure areas to an appropriate level, and cannot recommend funds sufficient only to maintain the 1984-85 level.

Consequently, Council's 1985-86 provision for meeting the costs of maintaining levels of service is an estimate of the net cost of providing for PTR for faculty and staff. The faculty manpower flow model developed by the Council of Ontario Universities (COU) predicts that, for the existing age distribution of faculty, under normal salary conditions (i.e., without the wage restraint program), the net costs of providing for PTR in 1985-86 would be 1.6% of salaries and benefits. However, similar to the salary scale calculations outlined in (ii) above, this estimate applies only to the last 10.5 months of the 1985-86 fiscal year.

The PTR costs in the first 1.5 months of the 1985-86 fiscal year are affected by the guidelines accompanying the *Public Sector Prices and Compensation Review Act, 1983*, which do not provide for additional funding of PTR costs during the 1984-85 salary contract year. The 5% compensation increase criterion mentioned in (ii) above includes the cost of providing merit increases and increments. Therefore, for the first 1.5 months of the 1985-86 fiscal year the estimated net cost of PTR (above that which is not included in the 5% salary scale provision found in Column 2 of Table I) is 0.0% of faculty and staff salaries and wages.

Applying the 0.0% PTR factor for 1.5 months and the 1.6% PTR factor for the remaining 10.5 months of the 1985-86 fiscal year results in an estimated net cost increase of 1.4% in 1985-86 for career progress of faculty and staff. This results in an additional $18.3 million in PTR costs.

(iv) Cost Reduction due to Efficiency and Rationalization (Column 4)

For several years, Council has reduced its total funding estimate by a factor varying between 0.5% and 1.5% in the belief that institutions can reduce expenditures to some extent, while maintaining service through improved efficiency and rationalization of their program offerings. In Advisory Memorandum 83-IV, Council recommended that a factor of -0.5% be used in calculating the funding requirements for 1984-85. In light of the *Public Sector Prices and Compensation Review Act, 1983*, Council recalculated the funding requirements for 1984-85 in Advisory Memorandum 83-IVA, reducing its efficiency/rationalization factor to 0.0%. In choosing to retain this factor in its revised funding advice Council indicated that it:

> . . . remains committed to the belief that the university system must continue to search for ways to increase efficiency. However, Council believes that this goal will be accomplished for 1984-85 by the *Public Sector Prices and Compensation Review Act, 1983*.

Council has again assessed retaining this factor in its funding model for 1985-86. In this assessment, Council examined carefully the past arguments of COU and others that any cost reductions that can be achieved by increasing efficiency and rationalization must be used to offset the backlog of major problems arising from prolonged underfunding and that the effects of the efficiency/rationalization factor are compounded annually at a greater rate than Council intended by ignoring the effects of previous years' shortfalls in funding on the base used in Council's funding model. Council has found these arguments persuasive in a period of continued underfunding. While Council still believes that the university system must continue to search for ways to increase efficiency, it believes that for 1985-86 it is appropriate to maintain the efficiency/ rationalization factor at the 0.0% level used in 1984-85.

(v) Projected Increase in Enrolment (Column 5)
In 1983-84, total university enrolment increased by about 3.4%. COU's Committee on Enrolment Statistics and Projections estimates a further 2.7% to 3.5% increase in 1984-85. Council has considered this forecast together with: (1) the most recent data on the number of visa and domestic student applications and applicants for first year admission in the Fall of 1984; (2) trends in the size of the cohort (18-24 years of age) from which universities will draw the majority of students; (3) recent trends in participation rates; (4) recent data on retention rates and the consequent potential enrolment increases in upper years in 1985-86; and (5) information provided by COU on institutional enrolment capacity.

On the basis of this information, Council estimates that enrolment in the university system in Ontario will increase by 1.5% in 1985-86 over 1984-85. When applied to Council's funding model (Table I) this yields an additional $24.7 million.

(vi) *Funding Stabilization Factor (Column 6)*
In order to dampen the effect of enrolment change in any one year on the level of funding, Council, for a number of years, has discounted by 50% the projected growth or decline in enrolment used in its funding advice. This discounting factor was first introduced by Council for funding in 1976-77 under the title Excess Capacity Factor. At that time Council stated that it believed that: ". . . currently predicted undergraduate enrolment increases can be accommodated within the university system at a marginal cost that does not exceed 50 per cent of average cost".[3] As part of its rationale for introducing a 50% discount factor in the operating grants allocative formula in 1977-78, Council stated that:

> . . . Council's advice on a formula allocation mechanism should be consistent with the advice it offers on the global funding of the university system. If Council's advice on global funding incorporates a discount on the funding of enrolment growth, the appropriate allocative mechanism is one that achieves a basically similar reduction in the credit accorded to the additional BIU's that accrue to institutions by virtue of enrolment growth. Such symmetry is essential if the funding of enrolment growth is to be kept distinct from the funding that enables the university system to cope with inflation and the real costs of maintaining existing levels of service...[4]

In December 1983 the Ministry of Colleges and Universities introduced a new operating grants formula where, for 1984-85 operating grants, 2/3 of these grants were allocated according to the existing formula (50% discount at the undergraduate and masters level and 66.6% discount at the doctoral level) and 1/3 according to a new 75% discounted formula. In its brief to Council on operating grant requirements for 1985-86, COU altered its discount on enrolment change in its global funding model to 75%, anticipating the phasing-in of this new operating grants formula.

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[3] Ontario Council on University Affairs, *Second Annual Report*, 1975-76, A.M. 75-VI, pp. 45-46.
It should be noted that the graduate freeze was in place at this time and that funding change was based solely on undergraduate enrolment change.

[4] Ontario Council on University Affairs, *Third Annual Report*, 1976-77, A.M. 76-VII, p. 51.

Council notes, however, that the new formula was announced for one year only and that the Commission to Review the Future Development of Universities of Ontario is instructed to address the issue of the appropriate operating grants allocative formula. Two factors have led Council to leave unchanged the enrolment discounting in its funding model. The first factor is that, since the future of the allocative formula is uncertain at this time and the degree of discounting to be present in 1985-86 is unknown, it would be premature to change the discount on enrolment in its funding model in order to maintain symmetry with an anticipated allocative formula. The second factor is that it would be appropriate to review the principle of symmetry between the global funding discount and the institutional allocative mechanism when the new allocative formula is known. The type of allocative mechanism introduced may not appropriately allow for symmetry with the global funding model. Council, therefore, continues to use an enrolment/stabilization factor of 50% in its 1985-86 funding model.

At its Spring hearings with Council, COU provided information indicating that the university system is very near capacity for undergraduate enrolment. Council's own calculations indicate that it is unlikely that the demand by new entrants will increase beyond the present enrolment capacity of the universities. However, if the demand by new entrants were to increase dramatically, Government would have to recognize that the marginal cost of these students would far exceed the average cost of all students, and a substantial increase in funding, for both operating and capital purposes, would need to be provided for the universities to be able to accommodate these students.

Given the level of enrolment change predicted in Column 5 (+1.5%) for 1985-86, Council continues to use a 50% enrolment discount factor, subtracting $12.3 million from the funding model.

(vii) Total Cost of Basic Funding Objectives (Column 7)

The total cost of basic funding objectives in Column 7 of Table I is the sum of the first six columns in the table. The resulting total of $1,657.4 million is Council's estimate of the total cost of basic funding objectives for 1985-86 - an 8.4% increase over the 1984-85 estimated expenditure base.

Estimated Government Grants Required to meet the Basic Funding Objectives

Council estimates that the other income accruing to the university system in 1985-86, in addition to Government grants, will be:

(1) from other sources, $53.6 million, the same as the amount projected for 1984-85;

(2) from fees other than tuition fees, $17.8 million, the 1984-85 projection adjusted for the projected 1.5% increase in enrolment in 1985-86; and

(3) from formula tuition fees, $282.4 million, at 1984-85 rates including an adjustment for the predicted 1.5% increase in enrolment in 1985-86.

Consistent with Council's advice on formula fee rates in Advisory Memorandum 79-IV, it is assumed that formula fee rates will increase by the same percentage as operating grants. Therefore, formula fee rates should be increased by 8.5% in 1985-86, yielding an additional $23.9 million for a total of $306.3 million in formula fee revenue in 1985-86.

Table II

Cost to Government of Meeting Council's Basic Funding Objectives for 1985-86: Provincially Assisted Universities, Affiliated Colleges, Ryerson, OISE, OCA and Dominican College

($ million)

1.	Cost of Basic Funding Objectives	1,657.4	
2.	Other Revenue	(53.6)	
3.	Other Fee Revenue	(17.8)	
4.	Total Formula Fees and Government Operating Grants required to meet Council's Basic Funding Objectives	1,586.0	
5.	Formula Fee Revenue at 1984-85 rates and the predicted 1985-86 level of enrolment	282.4	
6.	1984-85 Operating Grants	1,179.7	
7.	1984-85 Operating Grants and enrolment-adjusted Formula Fee Revenue (line 5 + line 6)	1,462.1	
8.	Percentage increase in Operating Grants and Formula Fee Revenue $\frac{(\text{line 4} - \text{line 7}) \times 100}{\text{line 7}}$		8.5%
9.	Additional Formula Fee Revenue generated by an 8.5% increase in formula fee rates	23.9	
10.	Total Formula Fee Revenue (line 5 + line 9)	306.3	
11.	Cost to Government of Basic Funding Objectives (line 6 increased by 8.5%)	1,279.7	

As shown in Table II, Council estimates that of the total $1,657.4 million required, $1,279.7 million must be made available as Government operating grants to meet the costs of Council's basic funding objectives in 1985-86. This is an 8.5% increase over the amount provided for 1984-85.

Accordingly, Council *recommends to the Minister and Lieutenant-Governor in Council*:

> *OCUA 84-5*
> *GOVERNMENT OPERATING GRANTS FOR 1985-86 TO MEET THE COSTS OF COUNCIL'S BASIC OBJECTIVES IN FUNDING PROVINCIALLY-ASSISTED UNIVERSITIES AND THEIR AFFILIATED COLLEGES, RYERSON POLYTECHNICAL INSTITUTE, THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION, THE ONTARIO COLLEGE OF ART AND DOMINICAN COLLEGE*
>
> *THAT* $1,279.7 million in operating grants be made available in 1985-86 to the provincially-assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College.

> *OCUA 84-6*
> *FORMULA FEE RATES FOR 1985-86 TO MEET THE COSTS OF COUNCIL'S BASIC OBJECTIVES*
>
> *THAT* formula fee rates for 1985-86 be increased by the same percentage as operating grants, namely 8.5%, to provide $306.3 million in formula fee revenue to the provincially assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College, and that this increase in formula fee rates be fully reflected in the Ontario Student Assistance Program.

Estimated Costs of the Bar Admission Course

As in previous years, Council's estimate of the costs of basic funding objectives does not include the cost of the grant-in-aid for the Bar Admission Course of the Law Society of Upper Canada. Council has consistently recommended that Government cover the cost of the grant-in-aid for the Bar Admission Course separately from its provision for Council's basic funding objectives. This recommendation has not been met. Council continues to believe that such a provision is necessary and desirable.

Accordingly, Council *recommends to the Minister and Lieutenant-Governor in Council*:

> *OCUA 84-7*
> *FUNDING FOR 1985-86 FOR THE BAR ADMISSION COURSE*
>
> *THAT* $0.78 million be provided in 1985-86 for a grant-in-aid for the Bar Admission Course.

Equipment and Library Needs

For 1984-85, Council recommended that $12.0 million be provided in recognition of the special need for equipment and library acquisitions. This recommendation was not accepted by the Minister. Council remains concerned about the level of funding available for the purchase of equipment and library resources, particularly in the areas of instructional equipment and library acquisitions.

COU recommended to Council in its brief on operating grants requirements for 1985-86 that an additional $40.0 million be made available for funding for equipment replacement in order to maintain existing service levels. This recommendation was based on a 12-year replacement cycle for equipment stocks valued at approximately $1 billion. Council has examined this recommendation closely and undertaken some further analysis of the issue of equipment replacement by assessing replacement cycles used in the private sector, implicit in the Income Tax Act and identified in specific university studies. It has become clear that this issue is complex and requires further study before Council can accept or reject the methodology suggested by COU.

However, in its investigation of this matter it has become evident that Council's recommendation for 1984-85, of $12 million for equipment and library resources, is inadequate. Such a level of funding implies an approximately 19-year replacement cycle for just the equipment portion of this recommendation. This does not take into account the funds necessary for the purchase of library resources. Hence, Council's continuing concern about the need to work towards restoring equipment and library collections has led it to recommend an increase to $20.0 million in additional funds for 1985-86. In making this recommendation, Council must make it clear that the provision of this level of funding will not restore equipment inventories and library collections to adequate levels and, according to COU's methodology, may even be inadequate to maintain the existing stock of equipment. Council does feel that this recommendation will relieve some of the pressures experienced in this area of expenditures in recent years. Council plans to look into this subject in more detail in the coming year.

Accordingly, Council *recommends to the Minister and Lieutenant-Governor in Council*:

> *OCUA 84-8*
> *EQUIPMENT AND LIBRARY FUNDING FOR 1985-86*
>
> *THAT*, in addition to the amounts recommended in 84-5, 84-6 and 84-7, $20.0 million be provided in 1985-86 in recognition of the special need for equipment and library acquisitions.

Capital Assistance

On June 5, 1984, the Minister of Colleges and Universities announced that $10.5 million will be provided in capital grants to Ontario universities for 1984-85. Only about $5.6 million of the above amount is allocated toward projects covered by Council's 1984-85 capital funding recommendation of $27.6 million for new major repairs, renovations and replacement projects.

Council continues to use a level of 1% of the value of the space inventory in the university system as the minimum necessary annually for major repairs, renovations and replacement projects. For 1985-86, the value of this space inventory has been adjusted for inflation by increasing last year's recommendation for capital assistance by 6.8%, the most recent increase in the Non-Residential Building Construction Price Index (from 1982 to 1983).

Accordingly, Council *recommends to the Minister and Lieutenant-Governor in Council*:

> *OCUA 84-9*
> *LEVEL OF SUPPORT FOR MAJOR REPAIRS, RENOVATIONS AND REPLACEMENT PROJECTS IN 1985-86*
>
> *THAT* funds for capital assistance in 1985-86 be $29.5 million for major repairs, renovations and replacement projects, plus any amount required for carry-overs and essential new construction.

Conclusion

While funding was increased for 1984-85, the amount fell short of that recommended by Council as being required for operating support. The shortfall between university system revenues and needs thus continues to accumulate. Adequate funding must be provided if Ontario is to have a university system capable of adequately meeting the five goals enunciated by Council in *The Ontario University System: A Statement of Issues* and endorsed by Government. These goals are: (1) to develop a more educated populace; (2) to educate and train people for the professions; (3) to provide study at the highest intellectual level; (4) to conduct basic and applied research including development and evaluation; and (5) to provide service to the community. It is Council's conviction that the funds recommended in this memorandum are the minimum required to ensure that quality does not decline further.

M. Paikin
Chairman
June 15, 1984

Appendix A

REVISED CALCULATION OF SHORTFALL IN FUNDING FOR 1984-85

The estimate of the basic funding requirements for 1984-85 contained in Advisory Memorandum 83-IX have been revised to reflect up-dated estimates of CPI and enrolment change. The inflation factors for salary and non-salary items have remained unchanged. Enrolment increase projections have been changed from 2.8% to 3.1%. As a result, the revised estimate of the cost of basic funding objectives in 1984-85 is $1,526.5 million.

The estimate of total funds available to the Ontario university system has also been revised to reflect up-dated information on government grants and fees. Council now estimates that total fee income (formula tuition and other fees) will be $295.7 million in 1984-85. Government operating grants will total $1,175.7 million (not including those funds provided for operating expenditures that are not part of the cost of basic objectives: $0.727 million for the grant-in-aid to the Bar Admission Course; and $4.0 million provided for additional incremental costs of bilingualism). Other revenue is estimated to be $53.6 million in 1984-85. Thus, the total estimated revenue available to the system is $1,525.0 million.

The revised estimate of the shortfall in revenue compared to the expenditures required to meet the basic funding objectives is $1.5 million ($1,526.5 - $1,525.0 million).

Appendix B

THE 1984-85 BASE

This appendix outlines the derivation of the 1984-85 base used in Council's funding exercise. For the purpose of this exercise, Council assumes that system expenditures in 1984-85 will equal total revenue, and estimates total operating revenue at $1,529.0 million. Table A - 1 provides details of 1984-85 revenues by type.

Formula and Non-Formula Grants

The figure $1,179.7 million found in Table A - 1 is derived by subtracting $5.1 million in line-item grants and $0.727 million to be used for the grant-in-aid to the Bar Admission Course from the $1,185.5 million in operating grants announced by the Minister on December 15, 1983 and rounding to the nearest decimal point. Unlike the shortfall calculation found in Appendix A, the figure used includes the additional $4.0 million made available for bilingualism costs. While not being part of Council's cost of basic objectives for 1984-85, the expenditures covered by this grant are intended to become part of the ongoing costs of basic objectives in subsequent years and thus have been included in the 1984-85 base for calculating the 1985-86 funding requirements.

Formula and Other Fees

Council's funding base includes only that fee revenue which is derived from formula fees and other fees. Any revenue accruing to the universities as a result of the application of their discretionary tuition fee power has been excluded from the base. The 1984-85 formula fee revenue is estimated to equal $278.2 million. This is calculated by applying the 1984-85 formula fee rates to 1983-84 enrolment and adjusting for the predicted 3.1% increase in enrolment for 1984-85. This figure also includes an estimate of supplementary foreign fee revenue and third-term graduate formula fees. The other fee revenue estimate of $17.5 million was based on the universities' budget reports for 1983-84.

Other Revenue

Other revenue includes Ministry line-item grants of $5.1 million and an estimated $48.5 million in other sources of income. The latter amount was derived from the universities' reports on budgeted revenue for 1984-85.

Table A - 1

University System Revenue
1984-85 Estimate
($ millions)

Formula and Non-Formula Grants*	1,179.7
Formula Fees	278.2
Other Fees	17.5
Other Revenue**	53.6
Total	1,529.0

---

*Excludes Ministry line-item grants and Bar Admission Course grant-in-aid.
**Includes Ministry line-item grants.

84-IV The Ontario Graduate Scholarship Program, 1985-86

In this memorandum Council renders its advice for 1985-86 on the value of the Ontario Graduate Scholarship (OGS) stipend, the number of stipends to be awarded and associated matters.

Scholarship Eligibility

On July 12, 1984, the Minister responded to Council's Advisory Memorandum 83-III and accepted Recommendation 83-4:

> THAT, the Ontario Graduate Scholarships be open equally to Canadian citizens and to persons who hold landed immigrant status as of the official annual closing date for applications, it being understood that this provision would apply similarly to institutional nominees.

This new scholarship eligibility regulation will come into effect with the 1985-86 competition.

Since it first began submitting recommendations with respect to the OGS competition, Council has been urging Government to alter the rules so as to treat all permanent residents in a more equitable manner, and so abolish the requirement that they be residents for at least 12 months prior to the deadline for submission of applications. Council, therefore, applauds the Minister's decision to amend the regulations in the manner suggested by Council.

Scholarship Stipend

In reply to Advisory Memorandum 83-III, the Minister announced that the value of the OGS stipend for 1984-85 would increase from the 1983-84 level of $2,195 per term to a level of $2,305 per term. This represents a 5% increase in the value of the award.

In Table I, Council presents a comparison of the values of the OGS, NSERC and SSHRC awards since the inception of the OGS program.

In the year that Council first submitted advice on the value of the OGS (1974-75), the OGS stipend was approximately 76% of the value of a Natural Sciences and Engineering Research Council (NSERC) award and 85% of the value of a Social Sciences and Engineering Research Council (SSHRC) award. By contrast, for 1984-85, the OGS stipend is 59.6% of the value of an NSERC award and 61.0% of the value of a SSHRC award.

Advisory Memorandum 83-III contained an outline of the effects that inflation, as measured by the Consumer Price Index, has had on the real dollar values of the OGS, NSERC and SSHRC awards. Table II updates this situation. It incorporates the actual rate of inflation for 1983-84 and an estimated rate of inflation for 1984-85. The table shows that given the 5% increase in the value of the OGS stipend there has been a decrease in the real value of the award over its 1983-84 value. The 1984-85 value of the award in 1974-75 constant dollars is 12.6% below the actual 1974-75 value. By comparison, the real dollar values of the NSERC and SSHRC awards for 1984-85 are, respectively, 10.8% and 21.9% higher than their 1974-75 values.

Council views with great concern the continuing deterioration in the OGS compared to the NSERC and SSHRC awards. In 1974-75 the OGS stipend trailed the NSERC and SSHRC awards by $1,100 and $600 respectively (see Table I). In 1984-85, the OGS stipend falls short of the two federal awards by $4,685 and $4,425, respectively (see Table I).

Table I

Comparative Scholarship Stipends

	OGS	NSERC PGS Stipends[1]	SSHRC Stipends (1st & 2nd PhD)
1974-75	$3,400[2]	$ 5,000	$ 5,000
1976-77	$3,750[2]	$ 5,520	$ 5,500
1977-78	$4,350	$ 6,000	$ 6,000
1978-79	$4,500	$ 6,360	$ 6,360
1979-80	$4,800	$ 7,000	$ 6,750
1980-81	$4,890	$ 8,500	$ 7,860
1981-82	$5,700	$ 9,350	$ 8,760
1982-83	$6,270	$10,500	$ 9,720
1983-84	$6,585	$11,100	$10,800
1984-85	$6,915	$11,600	$11,340
% increase 1984-85 over 1974-75	103.4	157.8	183.5

[1] NSERC post-graduate scholarship (PGS) values are those that were in effect in the Fall of each academic year.

[2] Adjusted to take account of the integration of fees into the stipend in 1976-77.

Table II

Comparative Scholarship Stipends

(In Constant Dollars 1974-75 = 100.0)

	OGS	NSERC PGS Stipends	SSHRC Stipends (1st & 2nd PhD)
1974-75	$3,400	$4,500	$4,000
1975-76	$3,094	$4,550	$4,550
1976-77	$3,191	$4,698	$4,681
1977-78	$3,409	$4,702	$4,702
1978-79	$3,233	$4,569	$4,569
1979-80	$3,158	$4,605	$4,441
1980-81	$2,893	$5,030	$4,651
1981-82	$3,010	$4,937	$4,625
1982-83	$3,026	$5,068	$4,691
1983-84	$3,007	$5,068	$4,932
1984-85	$2,973	$4,987	$4,875
% change 1984-85 1974-75	-12.6	+10.8	+21.9

In A.M. 80-I, Council cautioned that:

> If the OGS program is to function effectively as a scholarship program (which has always been, and continues to be, Council's position), it is clear that the value of the stipend must be significantly increased. Were the stipend to remain depressed, the program would lose its original purpose and instead become a student assistance program.[1]

Council went on to speculate whether:

> . . . current significant expenditures of time and effort on the part of the large number of individuals associated with the OGS selection process is worth the effort. Clearly, a higher stipend is imperative if the OGS is to be an effective scholarship program.[2]

Since 1980, Council has continued to document annually the deterioration in the value of the OGS stipend. While it has been understood, since the inception of the program, that Government envisaged scholarship-holders supplementing their awards with "teaching or research assistantships"[3], Government must also recognize that the large number of successful first-round applicants who decline to accept their awards undercuts considerably Government's aim of encouraging "excellence in graduate studies"[4]. According to the annual reports of the Selection Board Chairmen, it is clear that for at least the past five years, between 40% and 50% of successful first-round applicants have not accepted their awards. This has led to the establishment of reversion lists or a very large number of first-round awards being allocated in order to ensure that all the awards are given out each year. Successive Selection Board chairmen have concluded in their annual reports that the major reason for this happening is that these applicants have received alternate scholarships of higher value. Under the current OGS regulations, OGS award-holders cannot hold more than $2,500 in other awards concurrently. Council intends to review carefully this $2,500 limit.

As Council has emphasized consistently over the years, the OGS is becoming less a prestigious academic award and more a secondary form of student assistance. If Ontario is to retain some of its best scholars within the province, then the OGS program must be very carefully examined.

It is now ten years since the first OGS stipends were awarded. Council believes that this is an appropriate time to undertake a review of the purposes and effectiveness of this awards program. Therefore, in the coming months, Council intends to consult with chairmen of the OGS Selection Board, and with representatives of the Ontario Council on Graduate Studies and the Ontario Graduate Association. It would be premature for Council to recommend any long-term restructuring of the program until it has met with these representatives. This will also allow an opportunity for Council to assess the findings of the Commission on the Future Development of the Universities of Ontario.

Pending the outcome of Council's special review of the OGS program, Council's recommendation on the value of the stipend is being submitted in the usual way. Therefore, the minimum increase in the value of the stipend should not be less than Council's projected inflation factor for 1985-86, which is 5.7%. Therefore, the stipend should be increased to $7,309, or $2,436 per term.[5]

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[1] Ontario Council on University Affairs, *Seventh Annual Report*, 1980-81, p. 111.

[2] *Ibid*, p. 111.

[3] Letter from the Hon. James C. Auld to Dr. Stefan Dupre, October 7, 1975.

[4] Ministry of Colleges and Universities, *Ontario Graduate Scholarship Program*, 1984-85, brochure.

[5] Council has revised its estimate of inflation for 1985-86 downward to 5.7% from its June, 1984 estimate of 6.2% found in Advisory Memorandum 82-III.

Accordingly, Council *recommends to the Minister*:

OCUA 84-10
ONTARIO GRADUATE SCHOLARSHIP STIPENDS 1985-86

THAT, in 1985-86, Ontario Graduate Scholarships carry a minimum stipend value of $7,309, or $2,436 per term.

Number of Awards
Table III provides a revised summary, by category, on the number and distribution of OGS awards.

Table III

Number of OGS Awards
(by category)

	Open	Institutional	Visa/LI	Total
1974-75	850	150	(Quota)[1]	1,000
1975-76	850	150	(Quota)[1]	1,000
1976-77	850	150	(Quota)[1]	1,000
1977-78	850	45	50	945
1978-79	1,105	45	50	1,200
1979-80	1,095	45	60	1,200
1980-81	1,095	45	60	1,200
1981-82	910	40	50	1,000
1982-83	1,095	45	60	1,200
1983-84	1,095	45	60	1,200
1984-85	1,095	45	60	1,200

1. Up to 10% of the awards could be allocated to landed immigrants or holders of student visas.

For reasons first outlined in Advisory Memorandum 76-II, Council continues to advocate the allocation of institutional awards to those five universities not offering doctoral programs, but feels that there should be an increase in the number of awards in this category to enhance the quality of scholarship activity within these institutions.

Accordingly, Council *recommends to the Minister:*

OCUA 84-11
INSTITUTIONAL AWARDS TO UNIVERSITIES WITHOUT DOCTORAL PROGRAMS

THAT up to 55 scholarships (11 per university) be institutional awards in 1985-86 for those universities *without doctoral programs*.

OCUA 84-12
ONTARIO GRADUATE SCHOLARSHIPS TO PERSONS ON STUDENT VISAS

THAT up to 70 scholarships be reserved for persons who at the time of application are student visa-holders.

While Council continues to place a very high priority on maintaining the real value of the stipend, it must point out once again that, despite substantial increases in applications in all fields, there has been no increase in the number of awards since

1978-79. Tables V and VI provide information on the competition in all fields and types since 1978-79. The greatest application pressure continues to be in the physical, biological and applied sciences with overall increases, since 1978-79, of 41.7%, 59.4% and 104.0% respectively. These are graduate areas of vital societal need for the future of Ontario and should be supported strongly through the scholarship program. Overall, applications have risen by 45.2% since 1978-79, and the percentage of applicants supported by the program has actually fallen from 23.8% in 1978-79 to 16.4% in 1984-85.

If the funds are not available for an increase in the number of awards, then the number should be determined in the manner illustrated in Table IV of this memorandum. In view of these considerations, Council requests that, for 1985-86, the increase in funding for the Ontario Graduate Scholarship program be within the percentage range displayed in Table IV.

Accordingly, Council *recommends to the Minister*:

OCUA 84-13
NUMBER OF ONTARIO GRADUATE SCHOLARSHIP AWARDS IN 1985-86

THAT, consistent with the priority attached by Council to a 1985-86 stipend value of $7,309, the number of Ontario Graduate Scholarships available for:

a) open competition,

b) institutional awards at universities not having any doctoral programs, and

c) visa students

be scaled down as shown in Table IV so as to maintain the recommended value of the award at $7,309.

M. Paikin
Chairman
October 19, 1984

Table IV

Number and Composition of OGS Awards for 1985-86 under Alternative Funding Increases

Percent Increases in Funding for 1985-86 over 1984-85 %	Total Awards Possible at a Stipend of $2,436 per term[1] (No.)	Awards Available for Open Competition (No.)	Awards Available for Visa Students (No.)	Inst. Awards for Equal Dist. by Quota among Univ. with no Doctoral Programs (No.)
5.7[2]	1,200	1,095	60	45
6	1,204	1,099	60	45
7	1,215	1,109	61	45
8	1,226	1,120	61	45
9	1,238	1,131	62	45
10	1,249	1,142	62	45
11	1,260	1,152	63	45
12	1,272	1,163	64	45
13	1,283	1,169	64	50
14	1,294	1,179	65	50
15	1,306	1,191	65	50
16	1,317	1,201	66	50
17	1,328	1,212	66	50
18	1,340	1,223	67	50
19	1,351	1,233	68	50
20	1,363	1,245	68	50
21	1,374	1,255	69	50
22	1,385	1,266	69	50
23	1,400	1,275	70	55

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1. Assuming that there is no change in the mix of the two-term and three-term awards.
2. The recommended stipend of $7,309 for 1985-86 is approximately 5.7% greater than the stipend for 1984-85. Therefore, the OGS funding for 1985-86 would have to increase by approximately 5.7% to maintain the number of awards at 1,200, assuming that there is no change in the mix of two-term and three-term awards.

Table V

OGS Applications — Distribution 1978-79 to 1984-85

Field	1978-79	1979-80	1980-81	1981-82	1982-83	1983-84	1984-85	% change 1978-79 to 1984-85
Humanities	1,307	1,338	1,376	1,410	1,396	1,505	1,552	18.7
Social Sciences	1,805	1,931	2,128	2,265	2,260	2,670	2,627	45.5
Physical Sciences	645	590	658	685	810	865	914	41.7
Biological Sciences	880	929	1,100	1,124	1,196	1,430	1,403	59.4
Applied Sciences	404	383	449	487	587	752	824	104.0
Total	5,041	5,171	5,711	5,971	6,249	7,222	7,320	45.2

SOURCE: Annual reports of the Selection Board chairmen and statistics provided by the Ministry of Colleges and Universities.

Table VI

Results of OGS Competition, 1978-79 to 1984-85

Year	Type of Competition	# of Applicants	# of Awards	% receiving awards
1978-79	Open & Instit.	4,289	1,150	26.8
	Visa	752	50	6.6
Total		5,041	1,200	23.8
1979-80	Open & Instit.	4,604	1,140	24.8
	Visa	567	60	10.6
Total		5,171	1,200	23.2
1980-81	Open & Instit.	5,135	1,140	22.2
	Visa	576	60	10.4
Total		5,711	1,200	21.0
1981-82	Open & Instit.	5,285	950	18.0
	Visa	686	50	7.3
Total		5,971	1,000	16.7
1982-83	Open & Instit.	5,352	1,140	18.2
	Visa	897	60	6.7
Total		6,249	1,200	16.8
1983-84	Open & Instit.	6,278	1,140	18.2
	Visa	944	60	6.4
Total		7,222	1,200	16.6
1984-85	Open & Instit.	6,486	1,140	17.6
	Visa	834	60	7.2
Total		7,320	1,200	16.4

Source: Annual reports of the Selection Board chairmen and statistics provided by the Ministry of Colleges and Universities.

84-V Program Funding Procedures for Ryerson Polytechnical Institute

In Advisory Memorandum 82-XI, Council indicated that it would be discussing with Ryerson Polytechnical Institute the nature of the process which should be applied by Ryerson to the internal review of existing degree and diploma programs. In Advisory Memorandum 78-IV, Council had stipulated that: "To ensure continuing relevance to societal needs, a review of each program offering should be carried out by Ryerson at intervals of no more than seven years".[1] In 1982, Ryerson raised the question of whether the periodic review of existing programs should be as extensive as the process involving the reviews of new programs. This concern coincided with Council's belief that the intended review of the mechanism for the approval of new degree and diploma programs should be carried out as indicated in Advisory Memorandum 78-IV.[2]

Therefore, on April 29, 1983, Ryerson submitted to Council a draft brief to facilitate discussion of the review processes for new and existing programs. Council's Ryerson Committee met with representatives of Ryerson on May 19, 1983, and subsequently formalized its reaction to the draft in a letter dated September 29, 1983 (see Appendix "A"). The Ryerson Committee met with representatives of Ryerson on November 17, 1983 to discuss the letter of September 29, and on December 6, 1983 Ryerson officially responded to the letter and to points raised in the discussion (see Appendix "B"). Council formally responded in a letter of January 20, 1984 (see Appendix "C").

The process of consultation and discussion was completed by Council's acceptance of the final draft of the document, which was sent to Council under cover of a letter from Dr. Segal dated September 24, 1984 (see Appendix "D").

Council believes that the process of consultation with Ryerson has been a useful one for both Council and Ryerson. It has resulted in a document which is comprehensive, concise, understood and agreed upon by both parties. It modifies somewhat the procedures for the review of existing programs and new degree and diploma program proposals.

The following is a summary of the changes in the mechanism for the approval of new degree and diploma programs and in the mechanism for the periodic review of existing degree and diploma programs.

The Mechanism

The Minister's approval of Advisory Memorandum 78-IV established mechanisms for the periodic review of existing degree and diploma programs and the review of proposals for new degree and diploma programs. Certificate programs, both new and existing, were exempted from any approval mechanism for the following reasons:

> The certificate programs offered by Ryerson tend to be significantly different from either diploma or degree programs in their origin, duration and in some ways, their objectives. As programs established to provide comparatively specific education and training to a clearly defined clientele, often over a comparatively short period of time, they are commonly designed to provide skills to people already launched on a career rather than to prepare students for a vocation. These distinctive characteristics, combined with the need to respond quickly to changes in demand, suggest to Council that certificate programs should be treated differently from other programs in the approval process. Council is not suggesting that the

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[1] Ontario Council on University Affairs, *Fifth Annual Report*, 1978-79, p. 74.
[2] *Ibid.*, p. 74.

> assurance of academic excellence, financial viability and societal need is any less important for certificate than for degree and diploma programs. Rather, Council is confident that these requirements will be satisfied without formal application of the approval mechanism.[3]

Council continues to believe that certificate programs should be funded automatically.

The mechanism for the approval of new and existing degree and diploma programs essentially consists of:

> . . . a recommendation from Ryerson supported by Academic Council's approval of the academic quality of a program, the Board of Governor's assurance of the financial viability of the program and the Program Assessment Committee's report on the certification of societal need.[4]

The new mechanism as outlined in Appendix "D" spells out the sequence of considerations by Academic Council, the Board of Governors and what are now to be called Program Review Committees (PRC). The PRCs will have the same mandate as the old Program Assessment Committees (PAC), and will examine both new and existing programs, but now will:

a) be appointed by the Dean of the Faculty involved rather than the President,

b) be composed of seven to nine members external to Ryerson, rather than "at least seven",

c) have two or three of the seven to nine who will be selected from the relevant Departmental Advisory Committee,

d) have an overall membership which will "reflect the major constituencies of society, i.e., business and industry, professional societies and labour organizations, the public sector and the academic sector", rather than "five or more who are knowledgable in the program field including management, labour and educators, and two or more who are not involved in the program field".

e) have the Dean of the Faculty involved as an ex-officio member and the relevant department chairman as a resource person.

All of these changes are recommended by Ryerson as a result of its experience over the years with the review process.

Council is in agreement with these changes. While it might have seemed advisable to continue to have some members of the Committee who are not involved in the program field, Council accepts that Council's subsequent review of the program provides sufficient external review. As well, Ryerson is aware that the integrity of the process can be upheld only if a convincing case for societal need is made to Council.

For new programs, PRCs will, like the PACs, continue to examine such factors as anticipated student demand, employment opportunities for graduates, program uniqueness and whether the program is compatible with the role of Ryerson. For existing programs the PRCs will "focus primarily on the issue of current and anticipated market need", but will also review data relating to student demand and employment opportunities.

PRCs established to review new program proposals will also examine whether the program "should lead to a diploma or degree or be a combined degree/diploma offering". PRCs examining existing programs will, where appropriate, also examine this area. Council believes that this is a significant improvement in the review processes (see the discussion of this area in Appendices "A" and "B").

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[3] *Ibid.*, 76.
[4] *Ibid.*, p. 4

The new mechanism spells out precisely what is involved internally for Ryerson in the assessment of a program's academic quality and financial viability. Council endorses this more detailed description of these aspects of the mechanism.

The new mechanism is based upon considerations and principles outlined in Advisory Memoranda 78-IV and 80-III. Therefore, Council expects that the reports of the new Program Review Committees will include:

(a) a list of all institutions, organizations, agencies and corporations whose opinions on need were sought by the Committee,
(b) the formal response from those groups listed in (a), and,
(c) the judgment of the Committee based upon (b) and its own knowledge.[5]

As well, as noted in the document describing the new mechanism, Council and Ryerson will continue to be guided by Advisory Memorandum 80-IV, "The Role of Ryerson Polytechnical Institute", with respect to the general appropriateness of each program for the polytechnical setting.

Council believes that the modified mechanism for the review of existing degree and diploma programs and for the review of new degree and diploma program proposals will serve both Ryerson and Council well. Council commends Ryerson for the time and effort spent in applying the present mechanism to individual programs and for developing with Council the modified mechanism.

Accordingly, Council *recommends to the Minister*:

OCUA 84-14
MECHANISM FOR EXISTING DEGREE AND DIPLOMA PROGRAM APPROVAL AT RYERSON POLYTECHNICAL INSTITUTE

THAT, all existing degree and diploma programs at Ryerson continue to be eligible for formula funding on the recommendation of Council, such recommendation to be based upon the approval mechanism as outlined in Appendix "D" of this Memorandum.

And also accordingly, Council *recommends to the Minister*:

OCUA 84-15
MECHANISM FOR NEW DEGREE AND DIPLOMA PROGRAM APPROVAL AT RYERSON POLYTECHNICAL INSTITUTE

THAT, all new degree and diploma programs be considered for formula funding by the Minister on the recommendation of Council, such recommendation to be based upon the approval mechanism outlined in Appendix "D" of this memorandum.

M. Paikin
Chairman
January 18, 1985

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[5] Ontario Council on University Affairs, "Advisory Memorandum 80-III," *Seventh Annual Report*, 1980-81, p. 124.

Appendix A

Ontario

Ontario
Council on
University
Affairs

416/965-5233

7th Floor
700 Bay Street
Toronto, Ontario

September 29, 1983

Dr. Segal,
President,
Ryerson Polytechnical Institute,
50 Gould Street,
Toronto, Ontario

Dear Dr. Segal,

The Ryerson Committee of Council has recently been considering the contents of your recent brief on Ryerson's program review process (dated April 29th) and the results of the May 19th Hearing - primarily in the context of Council's comments in Advisory Memorandum 82-XI concerning internal program review. As a result of its deliberations, the Committee wishes to note the following points which it feels should be recognized in future descriptions of the Institute's program review process.

1. **The Degree/Diploma Continuum**

Although your document (in Appendix I) emphasizes one part of Advisory Memorandum 80-IV, no explicit mention is made of the following equally important section:

> Ryerson's unique position is reflected in the nature and range of the programs offered by the Institute. Ryerson offers roughly equal numbers of diploma and degree programs - often after some form of work experience. This type of "diploma-degree continuum" provides a distinctive opportunity for the Institute's students in the fields of applied arts, technology and business management. Council believes that the provision of this program mix is one of the most important features of the kind of polytechnical education provided by Ryerson. If the Institute's mandate were significantly altered, a void would be created which could not easily be filled by any other existing post-secondary educational institution.

The balance of diploma and degree programs, which was approximately 50:50 at the time A.M.80-IV was written, appears to be gradually inclining away from diploma programs in favour of degree programs. Such a trend, in the Committee's view, is regrettable and may ultimately constitute a significant alteration in the Institute's mandate. Care must be taken, therefore, to ensure that the program review process incorporates features which allow for a consideration of the overall impact of one or more program decisions on the Institute's program mix. It is the Committee's view, therefore, that part of Ryerson's program review process should involve an examination of whether a program (new or existing) should lead to a diploma or degree or should be a combined degree/diploma offering.

2. **Communication of Results**
We believe that, as a result of your comments at the May 19th Hearing, it would be more accurate on page 4 of the document (under "7. Final Decision") to combine the second and third sentences thusly:

> A decision that an existing program should be either continued or terminated will be communicated to OCUA and to the Minister of Colleges and Universities.

3. **Similar Programs**
The Committee suggests that the second sentence of the first paragraph at the top of page 3 might better read as follows:

> In addition, the committee will consider other factors such as whether similar programs are already available at the other *post-secondary* institutions *in the Province* and whether . . .

4. **"Polytechnical University"**
The Committee notes Ryerson's description of itself as "an innovative polytechnical *university*" (Appendix II). The Committee is disappointed that the Institute is apparently attempting to pursue a role within the system which is at odds with both provincial legislation and Council's repeated statements concerning the dangers involved in Ryerson making significant alterations in its established mandate.

With the acceptance by Ryerson of the points noted above, the Committee is prepared to recommend to Council that the April 29th document be accepted as an appropriate response to A.M. 82-XI.

Yours sincerly,

B. C. Matthews
Chairman

(Original signed by Dr. B. C. Matthews)

Appendix B

RYERSON
OFFICE OF THE PRESIDENT

December 6, 1983
Ref: 11/13

Mrs. M. Paikin, Chairman
Ontario Council on University Affairs
700 Bay Street
7th Floor
Toronto, Ontario
M5H 2T8

Dear Mrs. Paikin:

Thank you for the opportunity of meeting with yourself, Mr. Taylor and other members of Council's Ryerson Committee on November 17th. In light of our discussions, I should like to follow up with these comments on Dr. Matthews' letter of September 29th.

1. **The Degree/Diploma Continuum**

I hope that the data which we provided at the meeting (copies of which are attached) will reassure Council that Ryerson is committed to maintaining a strong balance between diploma and degree programs. For example:

In 1980, 52.8% of our academic awards were diplomas and 41.3% were degrees. In 1983, 51.1% were diplomas and 47.3% were degrees. In 1983, 68 more students graduated with diplomas than in 1980.

While in the past four years the number of programs offering degrees has risen from 22 to 25, the number of diploma awards has only changed from 21 to 20.

In 1979/80, 51.7% of our FFTE students were enrolled in diploma programs; in 1982/83 this figure had risen to 59.4%. Over the same period, the number of degree FFTE's had dropped from 45.8% to 40.3%.

The overall picture does, I think, reveal that changes in Ryerson's programs have been measured, rational, and modest. Nothing has happened since Advisory Memorandum 80-IV to suggest that Ryerson has been trying to shift the focus of its education.

At the same time, it is important to reiterate a point that we stressed at the meeting. We have been assigned the mandate to offer career-oriented education at the undergraduate level. We have been asked to pay particular and continuing attention to ensuring that our programs retain their market relevance, and to do this through the special mechanism of Advisory Councils. It is precisely in search of market relevance, and in response to the Advisory Councils, that the changes in Ryerson's programs have taken place, or are being contemplated. There is pressure for higher level credentials for career entry, and although the quality and rigour of a Ryerson diploma is the highest in Ontario, representatives of the career fields hiring our graduates are urging us to move these programs to degree level.

Since I became President, we have resisted all pressure to eliminate existing diplomas. We feel it is important for this exit point to be maintained, and intend to continue to do so. When we are persuaded that the societal need as contended by our Advisory Councils is borne out by the investigation of an independent Program Review Committee, we will forward to Council proposals for new degree programs.

We would agree that any proposal for a wholly new program would include an examination of whether it should lead to a diploma or degree, or be a combined degree/diploma offering. Where we feel such an examination is appropriate in the periodic review of an existing program we would be prepared to undertake it, but do not feel it is useful to stipulate this as a requirement for all existing programs.

Approval of such proposals will obviously alter the arithmetic ratio of diplomas to degrees. But this of itself should not, in our view, be the measure of whether Ryerson is fulfilling its educational mandate within the Ontario post-secondary system.

2. **Communication of Results**
We agree to your suggestion to combine the second and third sentences under "Final Decision" on page 4 of the document to read:

> A decision that an existing program should be either continued or terminated will be communicated to OCUA and to the Minister of Colleges and Universities.

3. **Similar Programs**
We agree to your suggestion that the second sentence of the first paragraph on page 3 should read:

> In addition, the Committee will consider other factors such as whether similar programs are already available at the other post-secondary institutions in the Province and whether . . .

4. **"Polytechnical University"**
Ryerson has no aspirations to offer post-graduate programs or to engage in basic research. Although we feel there is a valid role for applied research at the Institute, we recognize that this is not the current view of OCUA or the Government. Our use of the word "university", as in the phrase "an innovative polytechnical university", dates from a statement of objectives adopted by our Academic Council in 1974. Its recent use was intended to convey no more than that we are a degree-granting institution, treated by the Ministry as part of the university sector, offering university-level courses of study. We appreciate that this usage causes discomfort to Council and may suggest a broadening of our mandate that we do not intend. Accordingly, we will refrain from any further reference to Ryerson as a "university", but we will continue to use the term "university-level" with respect to those programs for which it is appropriate to do so.

Once again, may thanks for the opportunity to meet with the Ryerson Committee. I do hope we can arrange to discuss Ryerson's progress with the Committee on a on a somewhat more regular basis in the future.

Yours sincerely,

Brian Segal

attchs.

(Original signed by Dr. Brian Segal)

Number of Diploma only, Diploma/Degree, Degree only programs

Academic Awards	1979-80	1980-81	1981-82	1982-83	1983-84
Diploma only	10	8	8	8	8
Diploma and Degree	11	12	12	12	12
Degree only	11	14	14	13	13

Notes:

1980-81 (1) *Applied Computer Science* phased out diploma program and began to offer degree only.

(2) *Environmental Health* phased out certificate and began to offer degree only. Students can still leave after the second year and become certified Public Health Inspectors but they do not receive an academic award.

(3) *Nursing* added a two year degree program.

(4) *Technological Studies* received approval for a degree program but program never enrolled any students due to insufficient applications.

(5) The above four new degree programs were approved by Academic Council in December 1979/January 1980, sent to M.C.U. in February 1980 and approved on July 24, 1980 (Advisory Memorandum 80-III).

1982-83 (1) Degree program in Construction Management was discontinued. We are still phasing out this program but have not enrolled any new students since 1982-83.

November 17, 1983

Academic Awards

Year	Certificate	Diploma	Degree	Total
1980	133 (5.8%)	1210 (52.8%)	945 (41.3%)	2288
1981	116 (4.6%)	1342 (54.2%)	1018 (41.1%)	2476
1982	57 (2.2%)	1269 (44.6%)	1229 (48.1%)	2555
1983	36 (1.4%)	1278 (51.1%)	1183 (47.3%)	2497

Number of Programs

Year	Certificate	Diploma	Degree
1980	3	21	22
1981	1	20	25
1982	1	20	25
1983	0	20	25

Note: 1981 — Computer Science changed from a diploma to a degree program.
— Environmental Health went from a certificate to a degree program.
— Nursing added a degree phase to the program.

November 14, 1983

Year	Certificate		Diploma		Degree		Total	
	Bodies	F.F.T.E.	Bodies	F.F.T.E.	Bodies	F.F.T.E.	Bodies	F.F.T.E.
1979/80	264 (2.4%)	224.860 (2.4%)	5382 (49.5%)	4841.717 (51.7%)	5207 (48%)	4296.400 (45.8%)	10853	9362.97
1980/81	162 (1.4%)	127.540 (1.3%)	5139 (46.7%)	4710.520 (49.4%)	5683 (51.7%)	4686.800 (49.2%)	10984	9524.86
1981/82	81 (.7%)	61.670 (.6%)	6100 (55.4%)	5674.260 (59.6%)	4814 (43.7%)	3781.600 (39.7%)	10995	9517.53
1982/83	28 (.25%)	17.430 (.1%)	6054 (54.4%)	5769.210 (59.4%)	5038 (45.3%)	3921.820 (40.3%)	11120	9708.46

Table title: **Enrolment**

November 14, 1983

First Year/Semester Registered Student Background — Fall Term

Ryerson Summary

Year	Total # in Prog.	A OSSGD		B SSHGD Partial		C OSSHGD		D Oth. Can. S.Sch.		E R.P.I. Trans.		F Ont. CAAT		G Ont. Univ.		H Quebec		I Mature Student		J Oth. Can. Post-sec.		K & L Other		H Overseas	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
1977	3554	372	10.5	355	10.0	1818	51.2	66	1.6	89	2.5	92	2.6	369	10.4	43	1.2	198	5.6	85	2.4	12	0.3	55	1.5
1978	3789	324	8.6	427	11.3	1883	49.7	82	2.5	199	5.3	86	2.3	382	10.1	50	1.3	206	5.4	76	2.0	53	1.4	21	0.6
1979	3654	309	8.5	333	9.1	1810	49.5	75	2.1	117	3.2	92	2.5	425	11.6	44	1.2	223	6.1	84	2.3	90	2.5	52	1.4
1980	3626	278	7.7	224	6.2	1804	49.8	73	2.0	129	3.6	134	3.7	425	11.7	60	1.7	284	7.8	86	2.4	59	1.6	70	1.9
1981	3369	226	6.8	300	8.9	1736	51.5	82	2.4	101	3.0	129	3.8	354	10.5	38	1.1	222	6.6	82	2.4	35	1.0	62	1.8
1982	3403	365	10.7	266	7.8	1908	56.1	65	1.9	57	1.7	110	3.2	271	8.0	43	1.3	188	5.5	72	2.1	14	0.4	44	1.3

Appendix C

Ontario

Ontario
Council on
University
Affairs

416/965-5233

7th Floor
700 Bay Street
Toronto, Ontario
M5G 1Z6

January 20, 1984

Dr. B. Segal,
President,
Ryerson Polytechnical Institute
50 Gould Street,
Toronto, Ontario.

Dear Dr. Segal,

Thank you for your letter of December 6, 1983 which commented on matters raised in Dr. Matthews' letter of September 20, 1983. On behalf of Council I can inform you of Council's formal acceptance of your comments. We assume that the document entitled *Ryerson Program Review Process*, dated April, 1983, will be amended accordingly, and that an amended version will be forwarded shortly to Council.

I would like to thank you and your staff for your attention to this matter. Council looks forward to further discussions concerning your review process.

Yours sincerely,

Marnie Paikin

M. Paikin
Acting Chairman

MP:dd

Appendix D

Ontario

Ontario
Council on
University
Affairs

416/965-5233

7th Floor
700 Bay Street
Toronto, Ontario
M5G 1Z6

October 25, 1984

Dr. Brian Segal,
President,
Ryerson Polytechnical Institute,
50 Gould Street,
Toronto, Ontario.

Dear Dr. Segal,

Thank you for your letter of September 24, 1984 concerning Ryerson's new Program Review Process. It reflects completely our understandings and agreements. I wish to thank you and your staff for the work which I know went into arriving at this final version of the document. I am sure the procedures will be of great benefit to both Ryerson and OCUA.

We look forward to receiving a tentative schedule for the review of existing diploma and degree programs.

Yours sincerely,

Marnie Paikin

M. Paikin
Chairman

c.c. Members of OCUA Ryerson Committee
R. Benson

MP:dd

Appendix E

RYERSON
OFFICE OF THE PRESIDENT

September 24, 1984

Mrs. M. Paikin
Chairman
Ontario Council on University Affairs
700 Bay Street
7th Floor
Toronto, Ontario
M5H 2T8

Dear Mrs. Paikin:

I am pleased to convey with this letter the final form of the Ryerson Program Review Process. It has been amended to include changes requested by OCUA and agreed by us in a series of letters and meetings including:

- Matthews to Segal, 29 September 1983
- A meeting of the Ryerson Committee of OCUA and Ryerson representatives in the fall of 1983
- Segal to Paikin, 6 December 1983
- Paikin to Segal, 20 January, 1984

We will begin this academic year to cycle through this new Review Process for existing and new diploma and degree programs except the Survey Engineering degree Program. You will recall that we delayed submission of this program under the former Evaluation Process pending revisions to reduce its costs and improve its relationship to the survey profession. This work is in its final stages and the program will be submitted to OCUA in November.

As you know the Ryerson Program Review Process involves periodic re-assessment of existing diploma and degree programs. It is our intention to forward to you shortly a tentative schedule for the review of existing diploma and degree programs over the next seven years. We hope that this will facilitate your planning.

Sincerely,

Brian Segal

enc.

(Original signed by Dr. Brian Segal)

Ryerson Polytechnical Institute, 350 Victoria Street, Toronto, Ontario, Canada. M5B 2K3 (416) 979-5002

RYERSON PROGRAM REVIEW PROCESS

1. PURPOSE
2. SCOPE
3. MECHANISM
4. ASSESSMENT OF SOCIETAL NEED
5. ASSESSMENT OF ACADEMIC QUALITY
6. ASSESSMENT OF FINANCIAL VIABILITY
7. FINAL DECISION

RYERSON PROGRAM REVIEW PROCESS

1. Purpose

The Ryerson Program Review Process is designed to provide a means of determining whether a degree or diploma program is an appropriate program for Ryerson Polytechnical Institute. For an existing program, the process will determine whether the program continues to be appropriate and for a new program, the process will determine whether it is appropriate to establish the program.

The Ryerson Program Review Process is also intended to serve as the basis for the recommendation of OCUA that a new degree or diploma program be authorized for funding by the Minister of Colleges and Universities.

2. Scope

For the purposes of the Ryerson Program Review Process, the general nature of programs deemed to be appropriate to Ryerson is indicated in OCUA Advisory Memorandum 80-IV: *The Role of Ryerson Polytechnical Institute* (see Appendix 1) and in *Academic Aims and Goals*, approved by Ryerson's Academic Council (see Appendix II).

Within this context, the Ryerson Program Review Process will involve examination of three distinct aspects of all degree and diploma programs, namely:

(a) Societal need
(b) Academic quality
(c) Financial viability.

3. Mechanism

In the Ryerson Program Review Process, assessment of the three elements of a degree or diploma program will be carried out primarily by three bodies, as follows:

(a) Societal need	-	Program Review Committee
(b) Academic quality	-	Academic Council
(c) Financial viability	-	Board of Governors.

These three bodies will complete their work in sequence. Thus Academic Council will not make its final assessment of academic quality until the Program Review Committee has completed its assessment of societal need. Likewise, the Board of Governors will not make its final assessment of financial viability until Academic Council has completed its evaluation. It is emphasized that this sequence applies only to the final decisions of the three bodies: the possibility of simultaneous preparatory work or exchange of information by the three groups is not precluded.

It is intended to apply the Ryerson Program Review Process to both existing and new programs. All existing degree and diploma programs will be subject to the process at intervals of not more than seven years in order to confirm that it continues to be appropriate to offer them at Ryerson. In the case of new degree and diploma programs, the process will determine whether it is appropriate to establish them at Ryerson.

It may be noted that, in addition to the Ryerson Program Review Process there are several other review processes in operation at Ryerson. The Ryerson Program Review Process will be integrated into these various processes as appropriate.

4. Assessment of Societal Need

The assessment of societal need will be carried out primarily by a Program Review Committee. Every program will have a Program Review Committee consisting of persons external to the immediate Ryerson community. The members of the committee will be appointed by the Dean of the Faculty responsible for the program. The committee will consist of seven to nine members, two or three of whom will be selected from the relevant Departmental Advisory Committee (see Appendix III). The overall membership will reflect the major constituencies of society, i.e. business and industry, professional societies and labour organizations, the public sector and the academic sector. The Dean will be an *ex-officio* member of the Committee. The program Departmental Chairman will act as a resource person.

In the case of the review of an existing program, the committee will focus primarily on the issue of current and anticipated market need. The committee will be supplied with data on the level of student demand and the level of employment opportunities, in addition to any other relevant material. The committee itself may request or generate further material. Where considered appropriate by Ryerson the review of an existing program may include an examination of whether it should lead to a diploma or a degree, or be a combined degree/diploma offering. At the conclusion of its deliberations, the committee will issue a report. This report will contain all the data considered by the committee together with a statement that in the judgement of the committee, based on the data considered and the committee's own knowledge, the program does or does not continue to satisfy a societal need. The report will also contain any recommendations that the committee may care to make.

In the case of the review of a new program, the committee will again focus primarily on the issue of current and anticipated market need. In addition, the committee will consider other factors such as whether similar programs are already available at other post-secondary institutions in the Province and whether the proposed program is compatible with the role of Ryerson. The review of each new program will include an examination of whether it should lead to a diploma or degree or be a combined degree/diploma offering. The committee will be supplied with data on anticipated student demand and anticipated employment opportunities and also with data on any similar programs offered by other institutions. The committee itself may request or generate further material. At the conclusion of its deliberations, the committee will issue a report. This report will contain all the data considered by the committee, together with a statement that in the judgement of the committee, based on the data considered and the committee's own knowledge, the proposed program will or will not satisfy a societal need. The report will also contain any recommendations that the committee may care to make.

The report of the Program Review Committee will be forwarded to Academic Council for consideration.

5. **Assessment of Academic Quality**

The assessment of academic quality will be carried out primarily by Academic Council as charged under the Ryerson Act, 1977 (see Appendix IV).

The Dean of the faculty responsible for the program will issue a report dealing with the academic quality of the program.

In the case of the review of an existing program, the report will focus particularly on changes which have occurred since the program was previously reviewed under the Ryerson Program Review Process. Thus the report will provide information developments in program objectives, curriculum, methods of instruction, admission and promotion criteria, faculty, facilities, equipment and institutional resources. The report may also include recommendations for modifications to the program.

In the case of the review of a new program, the report will describe fully the objectives of the program, the proposed curriculum, methods of instruction, and admission and promotion criteria and required faculty, facilities, equipment and institutional resources.

The report on academic quality issued by the Dean will be forwarded to Academic Council for consideration.

After consideration of the report of the Program Review Committee dealing with societal need and of the report dealing with academic quality, Academic Council will make any changes to the program which it deems appropriate and then make a recommendation to the Board of Governors that the program be continued, terminated or established.

6. Assessment of Financial Viability

The assessment of financial viability will be carried out primarily by the Board of Governors.

Financial viability embraces two relatively distinct considerations, namely, financial soundness and financial availability.

Financial soundness relates to the inherent financial characteristics of the program and considers questions of the following type. Are the costs of the program's principal resource requirements reasonable in relation to the nature and size of the program? Do the ratios of outputs to inputs indicate an acceptable level of efficiency? Are there opportunities for improved efficiency?

Financial availability relates to the provision of funds to meet the costs of operating the program and considers questions of the following type: To what extent are the costs of the program matched by or included in revenues? Do the direct or indirect costs of the program have an impact on the availability of resources for other programs which is acceptable?

The Director of Finance and Dean of the Faculty responsible for the program will prepare a report dealing with the financial viability of the program. In the case of the review of an existing program, actual operating data will be used. In the case of the review of a new program, estimated data will be used.

The report of financial viability prepared by the Director of Finance and Dean will be forwarded to the Board of Governors for consideration.

7. Final Decision

After consideration of the report of the Program Review Committee dealing with societal need, the recommendation of Academic Council and the report of financial viability, the Board of Governors will make the decision that the program should be continued, terminated or established.

A decision that an existing program should be continued or terminated will be communicated to OCUA and to the Minister of Colleges and Universities.

A decision that a new program should be established will be forwarded to OCUA with a request that the program be recommended for funding. In such cases, the following documentation will be provided:

(a) The Report of the Program Review Committee dealing with societal need.

(b) The report issued by the Dean of the Faculty responsible for the program dealing with academic quality.

(c) The recommendation of Academic Council that the program be continued, terminated or established.

(d) The report prepared by the Director of Finance and Dean of the Faculty responsible for the program dealing with financial viability.

September 1984

APPENDIX I

EXCERPT FROM OCUA ADVISORY MEMORANDUM 80-IV: THE ROLE OF RYERSON POLYTECHNICAL INSTITUTE (AUGUST 8, 1980)

(Ryerson programs)

> . . . should continue to be more oriented towards the practical and the "immediately useful" than the universities' arts and science programs and, for that matter, the universities' programs in established professional disciplines. By offering such programs, which appeal to those students more oriented towards the immediate utilization of practical knowledge, Ryerson contributes to the development of Ontario's industrial/commercial base. Ryerson's programs should continue to relate directly to the market place; indeed, Ryerson's programs should fill either a current or anticipated market need or they should not exist.

APPENDIX II

ACADEMIC AIM AND GOALS

Aim and Goals which have been approved by Academic Council (February, 1977):

AIM

Ryerson Polytechnical Institute is an innovative polytechnical university providing career-oriented education for superior professional achievement.

GOALS

Goal #1 – Career-oriented programs and courses for students preparing to embark on their first career, about to change careers, or who desire to improve their knowledge and professional competence.

Goal #2 – Curricula which integrate the applied, theoretical, creative, and critical aspects of the arts and sciences.

Goal #3 – Admission of students who have career objectives related to programs and who are capable of completing the curriculum.

Goal #4 – Graduates who have capacity for leadership, creativity, analysis, judgement and reflection, and who are capable of meeting the changing needs of society.

Goal #5 – An educational atmosphere which encourages new approaches to teaching and learning.

Goal #6 – An innovative faculty with advanced academic qualifications, professional experience, teaching skills, and a concern for people.

Goal #7 – A high degree of individual contact between student and teacher.

Goal #8 – Physical facilities and support services that meet changing academic needs.

Goal #9 – Participation of faculty and students in relevant professional associations and learned societies.

Goal #10 – Useful relations with business, government, industry and the community.

Goal #11 – Participation in the solution of current problems of government, business, industry and the community.

Goal #12 – Local, national and international recognition of Ryerson's role in the educational community.

Ryerson Program Review Process September 1984

APPENDIX III

POLICY REGARDING DEPARTMENTAL ADVISORY COMMITTEES

Every program will have a Departmental Advisory Committee consisting of persons external to the Ryerson community. The members of the committee will be appointed by the program Departmental Chairman (who will be an ex-officio member of the committee). The committee will meet at least once per year and minutes of meetings will be kept. The purpose of the committee will be to provide advice to the Departmental Chairman regarding the relevance of the curriculum to market needs.

APPENDIX IV

EXCERPT FROM
BILL 25
AN ACT RESPECTING RYERSON POLYTECHNICAL INSTITUTE (1977)

Powers of Academic Council

10. The Academic Council has, subject to the approval of the Board with respect to the expenditure of funds, the power to establish the educational policy of the Institute and without limiting the generality of the foregoing has the power,

(a) to enact by-laws for the conduct of its affairs;
(b) to enact by-laws for the purposes of subsection 2 of section 9 in order to conduct the election of its members;
(c) to make recommendations to the Board with respect to the establishment, change or termination of programs and courses of study, schools, divisions and departments;
(d) to determine the curricula of all programs and courses of study, the standards of admission to the Institute and continued registration therein, and the qualifications for degrees, diplomas and certificates of the Institute.
(e) to conduct examinations, appoint examiners and decide all matters relating thereto;
(f) to award fellowships, scholarships, bursaries, medals, prizes and other marks of academic achievement;
(g) to award diplomas and certificates;
(h) to grant bachelor of applied arts, bachelor of technology and bachelor of business management degrees; and
(i) to create councils and committees to exercise its powers. *New.*

84-VI Funding for Three New Degree Programs at Ryerson Polytechnical Institute

In Advisory Memorandum 78-IV, which was approved by the Minister, Council established a mechanism for considering existing and new degree and diploma programs at Ryerson Polytechnical Institute. The mechanism essentially consists of:

> . . . a recommendation from Ryerson supported by Academic Council's approval of the academic quality of a program, the Board of Governors' assurance of the financial viability of the program and the Program Assessment Committee's report on and certification of societal need.[1]

Recently Council and Ryerson reviewed the mechanism for program approvals. The result of that joint review is the subject of Advisory Memorandum 84-V. Council is satisfied that the review has produced an even more comprehensive and accountable process. However, several new programs were submitted for approval during the process of review. These, therefore, were subjected to the existing mechanisms as outlined in Advisory Memorandum 78-IV.

Fashion (Bachelor of Applied Arts)

In January, 1984, Ryerson requested that Council consider for formula funding approval a new four-year degree program in Fashion. Ryerson has been enrolling students in Fashion courses since 1950. At present Ryerson offers a three-year diploma in Fashion, but now feels that it would be appropriate also to offer a four-year degree program. No degree programs in Fashion are currently available in Canada, and, therefore, those students wishing to obtain a degree have to go to the United States in order to further their education beyond the diploma level.

Council has been assured that Ryerson's Academic Council has approved the academic quality of the program. As well as regular Grade 13 applicants, CAAT and Ryerson Fashion alumni will be eligible for admission to the program. The degree program would be phased in (see Appendix "A"), and would include certain enrolment limits in various specializations (see Appendix "B"). A diploma would be awarded to those students who choose to exit from the program after three years.

Council also has been assured that the Board of Governors of Ryerson has attested to the financial viability of the program. Council notes that additional resources may be required, but Council concludes that the certification of financial viability indicates Ryerson's commitment to providing these resources through regular operating resources.

Council has reviewed in detail the report of the Program Assessment Committee (see Appendix "C" for summary of Report). The Report included, as required:

(a) a list of all institutions, organizations, agencies and corporations whose opinions on need were sought by the Committee.
(b) the formal response from those groups listed in (a), and,
(c) the judgment of the Committee based upon (b) and its own knowledge.

The Committee attests to the societal need for the program, and Council also notes that for the 1983-84 academic year there were 2.7 applicants for each place available in the diploma program.

The program has met all of Council's criteria for funding approval.

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[1] Ontario Council on University Affairs *Sixth Annual Report*, 1978-79, p. 74.

Accordingly, Council *recommends to the Minister*:

OCUA 84-16
FUNDING FOR THE NEW DEGREE PROGRAM IN FASHION AT RYERSON POLYTECHNICAL INSTITUTE

THAT the Bachelor of Applied Arts (Fashion) program be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1985-86 on, be included in the moving average for Ryerson Polytechnical Institute.

Aerospace Engineering Technology (Bachelor of Technology)

In July, 1984, Ryerson requested that Council consider, for funding approval, a new degree program in Aerospace Engineering Technology.

Ryerson has been offering Aerospace courses since 1956. In 1971, the current three-year diploma program was established within the Mechanical Engineering Department. In a supplemental submission on October 9, 1984, Ryerson clarified its wish to phase out the diploma program (though a diploma would be awarded to any students who completed successfully three years of the program and exited at that point) and to establish a degree program:

> . . . the present trend is that diploma graduates wish to proceed immediately to complete a degree; only those who cannot gain admission into our Mechanical Engineering Technology degree program proceed directly to the work force. Thus, the practical reality is that for our present students, the existing diploma is less and less a useful point of termination. When this fact is combined with industry judgement that a program which concentrates primarily on producing degree graduates is more useful in meeting societal need, the basis of our proposal becomes clearly evident.[2]

Council has been assured that Ryerson's Academic Council has approved the academic quality of the new program. As well, Ryerson's Board of Governors has attested to the financial viability of the program. Though Ryerson notes that some additional equipment resources will be required for the program, Ryerson anticipates "being able to finance their acquisition in the next 2-3 years through the regular capital budget of the Faculty of Technology."[3]

Ryerson also plans to improve by 1.7 F.T.E. its teaching capacity for the program when the proposal is approved. Again Council concludes this will be accomplished through a redeployment of regular operating resources.

Council has carefully reviewed the report of the Program Assessment Committee (see Appendix "D" for summary of Report), which surveyed over 200 companies in the aerospace industry. Ninety completed surveys were returned and all survey material was made available to Council. In all, firms indicated that they expected to hire some 1,600 new employees in the Aerospace field during the next three to five years. For a significant number of these, respondents indicated that they would prefer graduates of a Ryerson degree program over a diploma program. It is interesting to note that 28 companies indicated that they currently recruit personnel from offshore sources.

Council reviewed carefully the Program Assessment Committee's claim that the Ryerson program would not duplicate existing CAAT or university Aerospace Technology offerings. The following excerpt from the PAC Report summarizes accurately the place of the Ryerson program with respect to other post-secondary programs in the province:

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[2] Letter from Dr. Brian Segal to Mrs. Marnie Paikin, October 9, 1984, p. 2.
[3] *Ibid.*, p. 3.

> The C.A.A.T. programs generally produce graduates suitable for careers in pilot training, aircraft maintenance and for management positions in air transport operations. At the University of Toronto there is no first degree in aerospace although in the fourth year of Engineering Science optional courses are available, and advanced degrees in aerospace are available at the Institute of Aerospace Studies. Generally, similar but less extensive programs are offered at Carleton. Typically, these programs prepare graduates for technical design areas requiring strong analytical capabilities, or for Research and Development. The present Ryerson diploma is more practically oriented and it produces graduates most suitable for manufacturing, testing and development activities in Aerospace vehicles . . .
>
> The proposed Ryerson degree in Aeronautical Engineering will produce graduates having a higher academic standing and wider background than the current diploma program, while still maintaining the desirable benefits of a practical background. The proposed degree will fill the significant gap between the existing C.A.A.T. courses and the advanced degrees at the Universities of Toronto and Carleton, and it will have very little overlap with existing programs.[4]

Council is satisfied that the PAC has addressed thoroughly the societal need for the program. Council also notes that the ratio of applicants to places available in the current diploma program is 6:1.

Council is satisfied that this program has met all of Council's funding criteria for new Ryerson degree programs.

Accordingly, Council *recommends to the Minister*:

OCUA 84-17
FUNDING FOR THE NEW DEGREE PROGRAM IN AEROSPACE TECHNOLOGY AT RYERSON POLYTECHNICAL INSTITUTE

THAT the Bachelor of Technology (Aerospace Engineering Technology) program be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1985-86 on, be included in the moving average for Ryerson Polytechnical Institute.

Applied Economics (Bachelor of Applied Arts)

In April 1984, Ryerson requested that Council consider for funding approval its new degree program in Applied Economics. Economics is one of eleven "academic service departments". The others are: Business and Technical Communication; English (French Studies); Geography; History; Mathematics, Physics and Computer Science; Philosophy; Physical Health Education; Politics; Psychology; and Sociology. These departments form an integral part of Ryerson's array of course offerings. They provide a crucial liberal studies component in many applied professional programs. The Department of Economics offers its 26 courses to every program in Ryerson. Ryerson now proposes to offer a four-year degree program in Applied Economics, open to both full-time and part-time students.

Ryerson has applied the program approval mechanism set out in Advisory Memorandum 78-IV to this proposal. Therefore, Ryerson's Academic Council and Board of Governors have attested to the academic quality and financial viability of the program and Council has reviewed the report of the Program Assessment Committee (see Appendix "E" for summary of Report).

---

[4] Ryerson Polytechnical Institute, *Proposal for a Degree Program in Aerospace Engineering Technology at Ryerson Polytechnical Institute — Societal Needs: Report of the Program Assessment Committee*, March 1984, p. 6

In Advisory Memorandum 80-IV, Council stated that: "Ryerson's programs should continue to relate directly to the market place; indeed Ryerson's programs should fill either a current or anticipated market need or they should not exist."[5]Council is not convinced that there is a "current or anticipated market need" for this program.

Council believes that the need for qualified economists can be filled adequately by graduates of university undergraduate and graduate programs. Ryerson's proposed curriculum can be covered by several existing university undergraduate programs, and, therefore, there is not a unique niche for a Ryerson program in the Economics field. Some university programs, for instance, include a co-op feature and cover much of the same course content as the proposed Ryerson program.

Council has carefully reviewed all of the documentation made available, and concludes that the program is not consistent with Ryerson's role. Ryerson programs which are truly unique, and which fill a need that neither the community colleges nor the universities can fill, are and will be supported strongly by Council. This is not the case with the Applied Economics program. Council is certain that the Economics department at Ryerson will continue to perform a valuable and needed service function within the Institute; however the Department's role should not be expanded into the area of degree offerings.

Accordingly, Council *recommends to the Minister*:

OCUA 84-18
FUNDING FOR THE NEW DEGREE PROGRAM IN APPLIED ECONOMICS AT RYERSON POLYTECHNICAL INSTITUTE

THAT enrolment in a Bachelor of Applied Arts (Applied Economics) program at Ryerson Polytechnical Institute be deemed ineligible for formula support.

M. Paikin
Chairman
January 18, 1985

---

[5] Ontario Council on University Affairs, *Seventh Annual Report*, 1980-81, p. 75.

time phase implementation plan

Appendix A

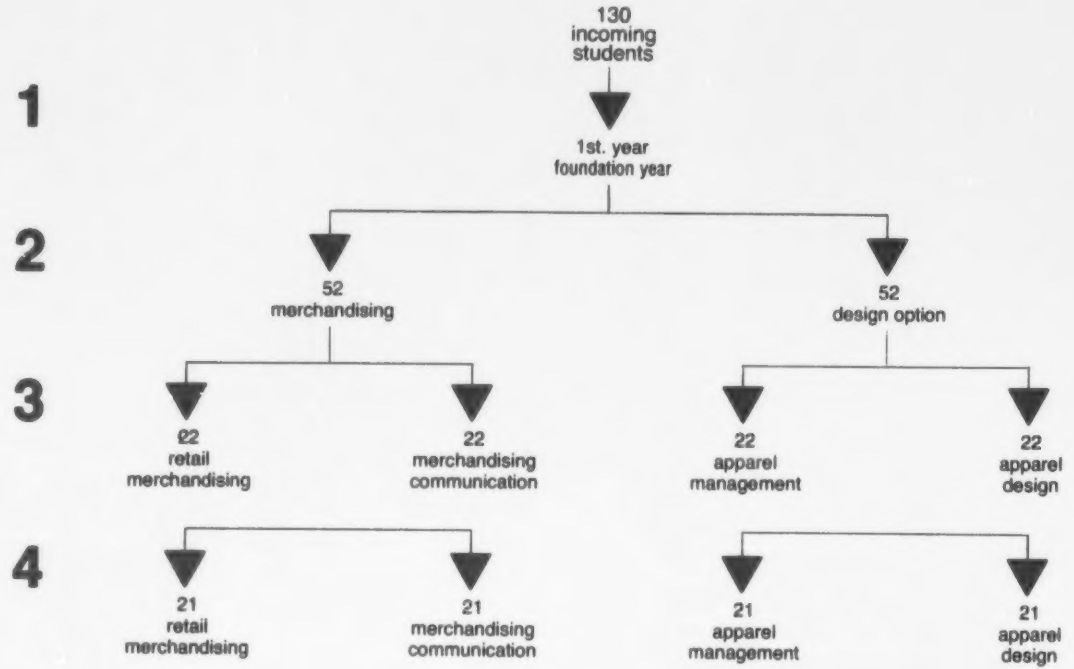
1981-82 →	• FINAL ACADEMIC YEAR FOR INCOMING STUDENTS INTO THE FORMER 3 YEAR DIPLOMA PROGRAM	
1982-83 →	• COMMENCEMENT OF LEVEL (YEAR) 1 OF THE REVISED 3 YEAR DIPLOMA PROGRAM	← PHASE 1
1983-84 →	• COMMENCEMENT OF LEVEL (YEAR) 2 OF THE REVISED 3 YEAR DIPLOMA PROGRAM • FINAL GRADUATING YEAR FOR STUDENTS OF THE FORMER 3 YEAR DIPLOMA PROGRAM	← PHASE 2
summer 84 ▶	• MAKE UP COURSES FOR 3 YEAR DIPLOMA STUDENTS AND FASHION ALUMNI WHO WISH TO ENTER INTO THE UNDERGRADUATE DEGREE PROGRAM AT THE 4th YEAR LEVEL	
1984-85 →	• COMMENCEMENT OF LEVEL (YEAR) 3 OF THE REVISED 3 YEAR DIPLOMA PROGRAM	← PHASE 3
1985-86 →	• COMMENCEMENT OF LEVEL (YEAR) 4 OF THE FASHION PROGRAM	← PHASE 4

fashion

time phase implementation plan

PHASE-IN OF REVISED THREE YEAR DIPLOMA
AND FOUR YEAR DEGREE PROGRAM

Appendix B


130
incoming
students
1
1st. year
foundation year
2
52
merchandising
52
design option
3
22
retail
merchandising
22
merchandising
communication
22
apparel
management
22
apparel
design
4
21
retail
merchandising
21
merchandising
communication
21
apparel
management
21
apparel
design

FIRST YEAR
LAB/STUDIO - FIVE (5) SECTIONS
26 STUDENTS PER SECTION
LECTURE, FOUR (4) SECTIONS
32 (+) STUDENTS PER SECTION

SECOND YEAR
LAB/STUDIO - FOUR (4) SECTIONS
26 STUDENTS PER SECTION
LECTURE - FOUR (4) SECTIONS
26 STUDENTS PER SECTION

THIRD YEAR
LAB/STUDIO - FOUR (4) SECTIONS
22 STUDENTS PER SECTION
LECTURE, FOUR (4) SECTIONS
22 STUDENTS PER SECTION

FOURTH YEAR
LAB/STUDIO - FOUR (4) SECTIONS
21 STUDENTS PER SECTION
LECTURE, FOUR (4) SECTIONS
21 STUDENTS PER SECTION

fashion

1st. year	130 students
2nd.	104
3rd.	88
4th.	84

TOTAL ENROLLMENT 406

Rate of Attrition	Student No.	Percentage
1st year to 2nd	26	20.0
2nd year to 3rd	16	15.4
3rd year to 4th	4	4.5

Appendix C

Lady Manhattan® OF CANADA
174 Spadina Avenue • Toronto, Ontario M5T 2C2 • Telephone (416) 362-1934

October 28, 1982

Dr. B. Segal, President
Ryerson Polytechnical Institute
Jorgenson Hall
Toronto, Ontario
M5B 1E8

Dear. Dr. Segal:

We, the undersigned, have evaluated the Fashion Department's proposal for a Four-Year Degree Program, to determine whether in our judgements, it will satisfy a societal need.

In carrying out our evaluation work, we have considered questions of student demand, employment opportunities, program duplication and the relationship of the Program to Ryerson's tradition and polytechnic role.

In reviewing the proposal with the Program Chairman, we have discovered that the number of interested and qualified applicants for each available space in First Year represents a ratio of 2.05 to 1 for the 1982-83 academic year. It should be noted that ratios of similar magnitude have been recorded for the past three years. (see "Admission Statistics" attached.)

The Committee has found no evidence that the present student demand will decline throughout the remainder of this decade. In our judgement, with effective marketing strategies, the Fashion Department could expect a substantial increase in student demand both nationally and internationally, for the next seven years.

In reviewing the level of employment opportunities for Fashion graduates, the Committee is of the opinion that too many students are devoting themselves exclusively to the goal of becoming a top-name designer. This can prove to be a frustrating and disillusioning experience when one considers the numerous areas where the design exposure can be such a powerful asset within the fashion industries. We were pleased to read in the Degree Proposal that the Fashion Department plans to reduce the number of students who are graduating in Design from the present forty-five to twenty-one.

The Committee also agrees with the Fashion Department in its proposal to increase the number of Business courses offered to Fashion students.

We believe that the Industry needs graduates who have a knowledge of marketing techniques as well as an understanding of manufacturing constraints and the limitations of production equipment.

In summary, we believe that the fashion industries need "Fashion Business Persons", be it in design, apparel, retail management or advertising.

The Committee was unable to find a post-secondary institution in Ontario or, for that matter, in Canada which offered a similar program to the one proposed by the Fashion Department at Ryerson Polytechnical Institute. We concur with the Department's statement that "the Program would be unique in that it would be the only one in Canada to award a Bachelor of Applied Arts (Fashion) to candidates who have obtained the required credits within the Four-Year Degree Program."

In our opinion the proposed Program would undoubtedly offer a much-needed bridge between Ryerson and other Ontario Educational Institutions. The fact that Fashion Graduates of Ontario's Community Colleges would be able to apply for advance standing into the Third Year of the Degree Program is a major step in the right direction.

The possibility of Canadian students obtaining a Baccalaureate Degree in Fashion in Canada for the Canadian Fashion Industry is also needed to reduce the number of qualified students who, each year, are forced to leave this country to further their education beyond the level of a Diploma in Fashion.

In our opinion the curriculum and structure of the proposed Four-Year Program reflects the level of training and education that the fashion industries require. We feel that the degree of specialized training which the program would offer should assist significantly in reducing the need for industry to seek people with specific training outside of Canada.

In reviewing the proposed program's curriculum and its compatibility with the Institute's academic aims and goals, we are of the opinion that it is indeed compatible with Ryerson's polytechnic role. With respect to the Institute's goals, we have found it difficult to comment on some of them which rely on the judgements expected from Ryerson's Academic Council and the Board of Governors.

We can only recommend that the necessary funding for the additional faculty, staff, physical facilities and support services that meet the changing academic program needs, will be found.

Furthermore, that an educational atmosphere as outlined in the Degree proposal which encourages new approaches to teaching and learning, will be given due consideration.

We were pleased to learn that the Fashion Department is proposing to offer a Diploma exit at the end of the Third Year of the Four-Year Degree Program. We feel that this would provide the student with an alternative to a career-oriented education without affecting the curriculum balance nor jeopardizing the quality of the program.

We welcome the Fashion Department's intention to offer certificate courses to part-time learners through the Continuing Education Division at Ryerson. It is our understanding that some of these courses would be accredited to both the Fashion Diploma/Degree Programs, thus offering an alternative method of study for those who cannot attend regular classes.

We have concluded that the program will satisfy a societal need and look forward to Institute's and Provincial support in receiving the necessary approvals as soon as possible.

Yours sincerely,

Rena Sava, Chairperson
Program Assessment Committee
Vice-President
Lady Manhattan of Canada

Neil Peacock
Executive Director
Fashion Canada

Lori L Brooks

Lori Brooks
Director of Design
Sea Queen of Canada

Robert Spencer

Robert Spencer
Chairman
Board of Education, Trustees

Molly Christie
Crafts Editor
Chatelaine Magazine

Andrew Tomcik

Andrew Tomcik
Chairman, Visual Arts
York University

Kenneth Christie
Managing Director
Dominion Simplicity Patterns

Wm Villano

William Villano, Manager
International Ladies'
Garment Workers Union

Nora McCullough
General Manager - Merchandising
Simpsons Limited

Ed Ziemba

Ed Ziemba, Organizer
International Ladies'
Garment Workers Union

Appendix D

THE DE HAVILLAND AIRCRAFT OF CANADA, LIMITED
DOWNSVIEW, ONTARIO M3K 1Y5

CABLES
MOTHTOR - TORONTO

TELEPHONE: (416) 633-7310
TELEX: DE HAV TOR 06-22128

March 7, 1984

Dr. Brian Segal
President
Ryerson Polytechnical Institute
50 Gould Street
Toronto, Ontario
M5B 1E8

Dear Sir:

We, the undersigned, having evaluated the Aerospace Engineering Technology Program in accordance with our mandate as the Program Assessment Committee, agree to the following conclusions:

(a) In our judgement, the Aerospace Engineering Technology Program represents a valuable contribution to the needs of society.

(b) Ample evidence is available to indicate a considerable demand for the program by the students.

(c) Expanding requirements in this technology field necessitate increased dedication to the specific disciplines which are currently addressed and a recognition of the professional status required.

(d) That the program is consistent with Ryerson's tradition of professional and liberal education to the first degree level.

(e) Employment opportunities in aerospace and associated fields exist and will continue to exist in the foreseeable future.

(f) That there is no conflict or duplication with courses offered elsewhere in the province, but conversely, the program is well integrated into other educational courses which address the various extensions of the aerospace and transportation industries.

(g) That the needs of society, in terms of education, employment opportunities, technology development and international sales, are directly addressed and will benefit, from the inclusion of this program in the curriculum.

In support of the above, we submit the attached report.

JA Conway
J. A. Conway
Manager - Engineering Administration
de Havilland Aircraft of Canada

W.J. Rainbird
William J. Rainbird
Senior Scientist
Dilworth Secord Meaher and
Associates Ltd.

Stan Gere
S. Gere
Senior Test Engineer
de Havilland Aircraft of Canada

L. Robinson
Dean of Durham College
Durham College

John Ashbee
Owner
Race Course Transportation Company

V. Weeks
Teacher
Queen Elizabeth Park School

R. Morris
Manager of Advanced Design Engineers
Pratt & Whitney Company

Brian Eggleston.
B. Eggleston
Chief of Initial Projects
de Havilland Aircraft of Canada

C. Trump
V.P. Assistant to the Chairman
Spar Aerospace Products Limited

Appendix E

November 27, 1981

Dr. Brian Segal
President
Ryerson Polytechnical Institute
50 Gould Street
Toronto, Ontario

Dear Sir:

RE: Applied Economics Program Assessment Committee

In assessing the societal need for the proposed program in applied economics, members of the Program Assessment Committee have found their terms of reference inappropriately limited in that societal need in our opinion, should not and cannot be evaluated without regard for cost and academic content.

As elaborated in the attached report, the Committee believes that there is a need for additional programs in economics to meet student demand for such programs and to satisfy employer demand for graduates in economics. The proposed program is well suited to meet those demands with its emphasis on training in communications as well as economics, management, and quantitative and research methods, and its insistence on practical application through internship. Accordingly, the Committee believes that the proposed program in applied economics should be offered by Ryerson, assuming that this can be done without undue additional costs to the Institute and with the understanding that the academic content fit the students (as Committee members believe it will) to continue their studies at the post-graduate level should they later wish to do so.

Yours very truly,

A. Guthrie, Chairman

A. Amery

J. Bennett

L. Dodd

A. Donner

D. Drinkwalter

J. Hoicka

M. Rothman

R. Schwass

B. Smith

D. Stager

K. Waldie

Attach.

(Original signed by each of the above)

November 27, 1981

REPORT OF THE APPLIED ECONOMICS PROGRAM ASSESSMENT COMMITTEE

Members of the Committee find that their terms of reference, requiring an assessment of societal need in terms of student demand, employment opportunities and duplication of program, without any reference to costs or to academic content, are unduly confining and, indeed, unreasonable. It is the Committee's view that societal need for, or benefits from, the proposed program in applied economics must be considered in relation to the costs of the program and should take into account academic content.

The Committee believes that student demand for programs in economics is, and will remain strong. This is based on data on student applications provided in the documentation supporting the proposal for the program and on evidence offered by Committee members aware of the number of applicants that are refused admission to existing economics programs at other Ontario universities because of lack of space or lack of teaching staff. In addition, there is a potentially important demand from "mature students", people now working who wish to upgrade their skills, and women who will seek professional training in order to re-enter the labour force (or even participate for the first time) after raising families.

The Committee also believes that job opportunities for graduates of economics programs are, and will remain, excellent. Committee members in the business and government sectors were very positive about employment possibilities for people with economics training, particularly when combined with management and communication skills. The survey of organizations carried out in preparing the original program also supports this belief.

Given strong student demand for economics programs and the positive employment outlook, the Committee believes the question of duplication of programs in other Ontario educational institutions is unimportant. To some extent, the proposed program in Applied Economics resembles economics programs offered by other institutions, although Committee members felt, some quite strongly, that the emphasis on training in written communication, research methods, data sources and the provision for an internship period, did differentiate the proposed program at Ryerson from those offered elsewhere. However, even if these differences are not great, the Committee feels there is no unnecessary duplication.

Finally, the Committee is satisfied that the proposed program is fully consistent with Ryerson's polytechnic role and aims to provide career-oriented training. However, members also emphasized the importance of insisting on the highest of academic standards so that graduates of the program would be able to go on to advanced studies should they so decide, either immediately or after working for a period of time.

In summary, the Committee is convinced that there is a need for more university level programs in economics and for programs that include practical training through internships. If Ryerson can provide its proposed program in Applied Economics without undue additional cost, the Committee strongly recommends that it do so.

In the event that the Program is implemented, the Committee has the following supplemental recommendations:

1. Given the important contribution that internship can make to the training process and to employability, the Committee recommends that, if resources permit, two summers of internship be included in the Applied Economics program.
2. Given the potential demand for professional training to upgrade the skills of people already working, the Committee recommends that every effort be made to make the Applied Economics Program available to part-time students.

84-VII Graduate Program Funding -

Management Science/Systems (PhD), McMaster University;
Administrative Studies (PhD), York University;
Art History (MA), York University;
Business Administration (MBA), Laurentian University;
Social Work (MSW), York University;
Linguistics (PhD), University of Ottawa;
Economics (PhD), York University;
German (MA), University of Western Ontario;
Romance Languages (MA), Wilfrid Laurier University;
French (MA), University of Windsor

Introduction

In Advisory Memorandum 84-II, Council indicated that it hoped to be able to phase in the offering of its funding advice on new graduate programs on an annual basis rather than several times a year. This was to be accomplished by clearing the backlog of program proposals through an advisory memorandum in the fall of 1984. This proved not to be possible. Council, therefore, in this memorandum initiates the practice of submitting annual advice on graduate program approvals, as outlined in Advisory Memorandum 83-VIII.

In this memorandum, Council offers advice on seven new graduate programs and three existing graduate programs. At the request of the Ministry, Council also offers for the first time a recommended weight for each master's program - it being understood that all doctoral programs, as outlined in the Ministry's *Operating Formula Manual*, will be in Category 8, with a weight of 6, or therefore, 2 per term.

The Fifth Criterion

Council's fifth interim funding criterion for new graduate programs is: "That the program is deserving of funding even in a time of economic constraint". In response to several enquiries from within the system concerning how this criterion is addressed, Council outlines below the factors which it takes into account in making its judgement.

Prior to the acceptance of Advisory Memorandum 83-VIII, the concept of funding approval in a time of economic constraint was not an explicit criterion, but rather was understood as something which arose naturally out of Council's duty to balance fiscal realities and new initiatives.[1] However, it is now an explicit criterion, and from Council's viewpoint it involves the weighing of three factors.

First, Council must evaluate the costs involved for an institution in offering a new program. The need for additional capital, equipment and instructional resources must be examined. Council's support of the provision of formula funding for a program should not be construed as an endorsement of an institution's subsequent request for capital funding associated with a program. In an era of straitened financial resources, Council expects that universities should, in establishing a new graduate program, be building upon existing discipline strengths and resources. Therefore, normally there should not be any need for the addition of significant new resources.

In establishing a new graduate program there may, however, be some need to shift or add on resources within the institution in order to maintain the quality of the undergraduate enterprise. For instance, a greater undergraduate teaching workload might be placed on some instructors as others become more involved in graduate teaching and supervision; and, as well, more teaching assistants, and additional faculty may be required. There are, therefore, institutional pressure-points which may have to be faced involving the assignment of teaching priorities, the evolution of departments and the overall configuration and so deployment of resources within an institution.

---

[1] Letter from Dr. W. C. Winegard to Dr. E. J. Monahan, October 30, 1979.

There is also an impact on the university system when a new program is funded. This occurs in two ways: The additional eligible graduate Basic Income Units (BIUs) generated can result in the overall graduate BIU value being diluted and consequently a redistribution of the total graduate BIU funds available. This affects the resources available to institutions to offer their existing array of programs.

As well, this redistribution has an effect on the adequacy of Government funding for existing and new programs.

In summary then, in addressing the fifth criterion, Council weighs the following factors:

- impact on the institution offering the new program;
- impact on the university system; and
- impact on Government funding.

The fifth criterion must always be balanced in relation to the other four funding criteria in order for Council to make judgements about individual new program initiatives. Societal needs must be measured, and Council must keep in mind the public's concern for both accessibility (regional and provincial) and quality (of both existing and new programs). As well, the effect of the introduction of a new program on other existing programs in the same discipline must be examined. In some cases, for example, a new program may be superior to an existing program.

I. New Graduate Programs

Management Science/Systems (PhD), McMaster University

Council has reviewed the advice of its Academic Advisory Committee regarding McMaster's new doctoral program in Management Science/Systems (see Appendix A). As noted in Appendix B of Advisory Memorandum 83-II:

> In Advisory Memorandum 78-III, Council postponed making any recommendation on any of three new doctoral programs in Business until such time as it had received a report from the Council of Ontario Universities (COU) "regarding the plans for doctoral studies in Business in Ontario and how these plans fit in with the objectives for the first quinquennium set out by Council in Advisory Memorandum 77-VII". COU was unable to submit such a report, and it was agreed, after the abandonment of the sectoral approach to graduate planning, that the individual institutions could forward their respective doctoral programs in Business directly to Council for consideration.[2]

Council accepts that McMaster has sufficiently strengthened its program so that the envisioned cooperation with York and Toronto is no longer a crucial factor in the consideration of this program.

Council notes the recommendation of the external consultant that:

> OCUA should review every 5 years the situation with respect to enrolment levels and program emphasis at McMaster and York.

Council takes this recommendation under advisement. Council expects COU to look carefully at both the enrolment levels and program emphases of the McMaster and York programs at the time these programs next undergo their respective periodic appraisals.

---

[2] Ontario Council on University Affairs, *Tenth Annual Report*, 1983-84, p. 22.

As the requisite teaching and library resources have been in place for some time now, it does not appear that there are any significant new resource implications for McMaster arising from the proposed approval of the program. The program, since it is a doctoral program, falls into Category 8 for formula funding purposes, with a weight of 6 or 2 per term. The same formula funding arrangements as accorded the new doctoral program in Business at Queen's should apply to this program (see Advisory Memorandum, 83-II), and so a certain degree of retroactivity should be allowed.

Council notes that since 1981 the number of vacancies for academic positions in Business has risen from 200 to 244 in 1984, an increase of 22%. Given the increasing number of academic staff vacancies in the Business field, and some specifically in the Management Science/Systems area, Council believes that this program should be funded in a time of constraint so as to help ensure the continuing quality of existing undergraduate and graduate Business programs.

Accordingly, Council *recommends to the Minister*:

OCUA 84-19
FUNDING FOR THE DOCTORAL PROGRAM IN MANAGEMENT SCIENCE SYSTEMS AT McMASTER UNIVERSITY FOR 1986-87

THAT the PhD program in Management Science/Systems at McMaster University be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1983-84 on, be included in the moving average for the university.

Administrative Studies (PhD), York University

Council has reviewed the advice of its Academic Advisory Committee with respect to York's new doctoral program in Administrative Studies (see Appendix A). Students have been enrolling in this program since 1971, but, due to a series of funding embargoes, assessments and recommendations by COU's Advisory Committee on Academic Planning (ACAP) and Council's Advisory Memorandum 78-III, the program was not officially forwarded to Council until January, 1983.

Council accepts the Academic Advisory Committee's argument that exceptional circumstances, involving societal need, exist such that a case for justifiable duplication can be made with respect to this program. As York has noted:

> So acute is the shortage of Canadian graduates in this field that the federal Ministry of Employment and Immigration has granted all Business schools an exemption from the "Canadians and landed immigrants only" rules that otherwise apply to advertisements of faculty positions.[3]

York has offered this program since 1971 without formula support at a cost of approximately $300,000 per year. Council, in recommending this program, believes that some measure of retroactivity should be included in the formula funding awarded.

Council is satisfied that this program meets all of Council's funding criteria, including Council's fifth criterion of funding in a time of economic constraint.

Funding in such a time is justified on the same grounds as those outlined above for the McMaster program.

Accordingly, Council *recommends to the Minister*:

OCUA 84-20
FUNDING FOR THE DOCTORAL PROGRAM IN ADMINISTRATIVE STUDIES AT YORK UNIVERSITY FOR 1986-87

THAT the PhD program in Administrative Studies at York University be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1983-84 on, be included in the moving average for the university.

---

[3] Letter from Dr. David Bell to Mrs. Marnie Paton, February 27, 1984.

Art History (MA), York University

Council has reviewed the advice of its Academic Advisory Committee with respect to York's new master's program in Art History (see Appendix B). Council is satisfied that the program has met the first four of Council's funding criteria. As well, the program should be funded, even in a time of constraint, because it meets a small, but well-defined need for specially trained Canadian-oriented curatorial experts and, as well, because the program does not duplicate other funded programs in this field. As this is a master's level Fine Art program it falls in Category 6 for formula weighting purposes.

Accordingly, Council *recommends to the Minister*:

OCUA 84-21
FUNDING FOR THE MASTER'S PROGRAM IN ART HISTORY AT YORK UNIVERSITY FOR 1986-87

THAT the MA program in Art History at York University be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1985-86 on, be included in the moving average for the university - the program to be in Category 6, with a weight of 3, or 1 per term, as outlined in the Ministry's *Operating Formula Manual*.

Business Administration (MBA), Laurentian University

Council has reviewed the advice of its Academic Advisory Committee concerning Laurentian's new master's program in Business Administration (see Appendix C). Council is satisfied that the proposal meets the first four of Council's funding criteria. In particular, Council endorses the Committee's argument that the strong need for regional accessibility produces a case for justifiable program duplication.

It is Council's understanding that Laurentian would need to hire additional staff were it to operate the second year of the program on a full-time basis. Therefore, offering the program in its present format is consistent with the existing strengths and resources available to the program.

As the program is meeting a critical need for the development and upgrading of regional business skills, Council believes that it should be funded even in a time of constraint. As this is a master's-level Business Administration program, it can be classified under Category 5 for formula weighting purposes.

Accordingly, Council *recommends to the Minister*:

OCUA 84-22
FUNDING FOR THE MASTER'S PROGRAM IN BUSINESS ADMINISTRATION AT LAURENTIAN UNIVERSITY FOR 1986-87

THAT the MBA program at Laurentian University be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1985-86 on, be included in the moving average for the university - the program to be in Category 5, with a weight of 2, or 1 per term, as outlined in the Ministry's *Operating Formula Manual*.

Social Work (MSW), York University

Council has reviewed the advice of its Academic Advisory Committee regarding York's new master's program in Social Work (see Appendix D). Council finds itself in agreement with the Committee's advice concerning the first four of Council's funding criteria. Council accepts that there is a strong argument for having another master's program in the Toronto area, which is offered exclusively on a part-time basis. In fact, Council believes that this is the strongest argument for funding the program in a time of economic constraint. Therefore, funding should be conditional on York's maintaining an exclusively part-time enrolment. Like other master's program's in Social Work, this program falls into Category 7 for formula weighting purposes.

Accordingly, Council *recommends to the Minister*:

OCUA 84-23
FUNDING FOR THE MASTER'S PROGRAM IN SOCIAL WORK AT YORK UNIVERSITY FOR 1986-87

THAT the MSW program in Social Work at York University, as it is to be offered strictly on a part-time basis, be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1985-86 on, be included in the moving average for the university - the program to be in Category 7, with a weight of 4, or 1.333 per term, as defined in the Ministry's *Operating Formula Manual*.

Linguistics (PhD), University of Ottawa

Council has examined the advice of its Academic Advisory Committee concerning the new doctoral program in Linguistics offered by the University of Ottawa (see Appendix E). Council accepts the advice of the Committee with respect to the first four of Council's funding criteria. Council is persuaded that this program should be funded even in a time of economic constraint because this will be only one of two such doctoral programs in Ontario, the only one of a bilingual nature and the only one with its particular academic orientation.

Accordingly, Council *recommends to the Minister:*

OCUA-84-24
FUNDING FOR THE DOCTORAL PROGRAM IN LINGUISTICS AT THE UNIVERSITY OF OTTAWA FOR 1986-87

THAT the PhD program in Linguistics at the University of Ottawa be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1985-86 on, be included in the moving average for the university.

Economics (PhD), York University

Council has reviewed the advice of its Academic Advisory Committee regarding the new doctoral program in Economics at York University (see Appendix F). Council endorses the Committee's findings that the program does not meet all of Council's funding criteria.

Accordingly Council *recommends to the Minister:*

OCUA 84-25
FUNDING FOR THE DOCTORAL PROGRAM IN ECONOMICS AT YORK UNIVERSITY

THAT the PhD program in Economics at York University be deemed ineligible for formula support.

II. Existing Graduate Programs

In Advisory Memorandum 83-VIII, Council indicated that funding should be withdrawn from any existing graduate program which failed:

a) to be of acceptable academic quality, as certified by the Council of Ontario Universities (COU), and/or,

b) to meet a justifiable need.[4]

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[4] Ontario Council on University Affairs, *Tenth Annual Report*, 1983-1984, p. 74.

Also, as indicated in Advisory Memorandum 83-VIII, COU has adopted a new system for the periodic appraisal of existing programs. In this process, a program is classified in one of the following categories:

Category "a":
Programs that have achieved a level of good quality and which are expected to retain that level of quality over the next seven year period.

Category "b":
Programs that have achieved a level of good quality at the time of the appraisal, but for which it was expected that problems would develop before the next seven-year review, for example, due to retirements of senior faculty. Such programs are approved to continue but the university is asked to submit a report, normally within two to four years, on the steps it has taken to maintain the quality.

Category "c":
Programs that require minor improvements to meet the quality standard. Such programs receive conditional approval at the time of appraisal and full approval when the Appraisals Committee is satisfied that the improvements have been made.

Category "d":
Programs that fail to meet the quality standard. Such programs require major improvements to achieve the required level, such as the addition of a number of new faculty or significant new library or laboratory resources. The university will cease admitting students to the program until it has been successfully reappraised.[5]

A university has the option of asking either that a program be deferred for one year or withdrawn altogether from the process of appraisal. If a program is deferred, it is deferred for one year only, and then must be appraised in the regular manner. However, if a program is withdrawn the university must cease admitting new students to the program.

In the 1983-84 annual report of the Ontario Council on Graduate Studies (OCGS) no programs were reported as falling in the "d" category; there was one deferral; and three programs, at the individual requests of the universities involved, were withdrawn from the appraisal process. In the case of these three programs, as COU cannot certify that they are of acceptable academic quality, Council believes that it must recommend that funding be withdrawn.

Accordingly, Council *recommends to the Minister*:

OCUA 84-26
FUNDING FOR THE MASTER'S PROGRAM IN GERMAN AT THE UNIVERSITY OF WESTERN ONTARIO, THE MASTER'S PROGRAM IN ROMANCE LANGUAGES AT WILFRID LAURIER UNIVERSITY AND THE MASTER'S PROGRAM IN FRENCH AT THE UNIVERSITY OF WINDSOR

THAT enrolment in the MA program in German at the University of Western Ontario, the MA program in Romance Languages at Wilfrid Laurier University and the MA program in French at the University of Windsor be deemed ineligible for formula support, commencing in 1985-86.

Council will continue to monitor the quality of, and the need for, existing funded graduate programs, and will advise accordingly each year.

M. Paikin
Chairman
February 22, 1985

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[5] Ontario Council on Graduate Studies, *Report to the Ontario Council on University Affairs — Appraisal Results, 1983-84*, p. 2.

Appendix A

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS ACADEMIC ADVISORY COMMITTEE

Doctoral Program in Management Science/Systems (PhD), McMaster University and Doctoral Program in Administrative Studies (PhD), York University - New Graduate Programs Considered for Formula Funding

On March 4, 1983, in recommending the new doctoral program in Management at Queen's University for formula funding approval,the Committee indicated to Council that it would be reviewing together the New York and McMaster doctoral programs in Business.

The Committee was initially concerned that the cooperation envisioned several years earlier by COU for doctoral Business studies among York, McMaster and oronto had not materialized. The Committee wished time to explore this and other matters further. Council accepted the Committee's advice. The Committee now reports on its consideration of these two programs.

First the Committee requested the Chairman of OCUA to invite each institution involved to comment on the types of cooperation which existed among the three universities. On May 2, 1983, the Chairman of Council specifically asked each university to comment on a 1977 document entitled *Proposed Basis for Cooperation among McMaster, Toronto and York Universities in Ph.D. Programmes in Management*. The document had been submitted to COU by the Business faculties at McMaster, Toronto and York in response to a recommendation contained in the 1974 COU Advisory Committee on Academic Planning's (ACAP) Discipline Assessment Report on Business. The institutional responses to the report were not completed until late fall of 1983.

The 1977 report proposed that there be cooperation in four areas: seminars and courses, admissions, examinations and thesis committees. It also recommended that a special fund for meeting the expenses of cooperation be established so that an outstanding centre for PhD work in Business could be established through the pooling of the resources of the three universities.

The following is a brief summary of the institutional responses concerning cooperation today:

Seminars and Courses

i) McMaster offers a seminar in management science and information systems which is open to Toronto and York students. A joint seminar was conducted five times between 1976 and 1981, but was discontinued due to financial constraints for McMaster, which funded it 3 out of 5 times and the reluctance of York and Toronto to be major contributors to the seminar since so few of their students actually participated.

ii) York and Toronto have since 1977 conducted a jointly funded seminar in marketing, with students and faculty from both institutions participating. The seminar runs for 26 weeks.

iii) There is also a jointly funded visiting speakers' series in marketing, which has been in existence since 1981.

iv) In Finance, York students have, since 1978, been required to take a specific three-course sequence within the Toronto program. Toronto students may also soon be able to take a York course in Finance.

v) York's Finance area has held a series of weekly seminars/ research colloquia and Toronto students are invited to these. There are also faculty workshop exchanges.

vi) There is some limited cross-enrolment of students in Organizational Behaviour at York and Toronto, and there is a joint speakers' series in this area and in Policy.

vii) Toronto students enrolling in York courses have usually been in International Marketing and International Business.
viii) There has been very limited, if any, enrolment of McMaster students in York and Toronto courses or vice versa.

Admissions

No common admissions standard has been devised due to the differences among the three programs. McMaster, however, would see some merit in exploring this subject if it ever expanded its areas of emphases within its Business program. The 1977 recommendation that there be annual meetings to review the compatability of standards among the programs was not acted upon.

Comprehensive Examinations and Thesis Supervision

The concept of common comprehensive examinations was never really explored by the institutions involved. There is some cooperation between Toronto and York in this area, but McMaster because of the specialized nature of its program has not engaged in similar cooperative efforts. Some York professors have sat on Toronto thesis committees and vice versa.

The review of program cooperation, therefore, indicates that some cooperation exists between York and Toronto, but very little exists which involves all three institutions. Three factors appear to have militated against tripartite cooperation:

a) the highly specialized nature of the McMaster program,

b) the physical distance between the cities of Toronto and Hamilton, and

c) the fact that no "cooperation fund" was established.

McMaster's comparatively small enrolment would suggest that greater cooperation should occur. The Committee, however, is willing to accept McMaster's view that:

> . . . several of the ideas regarding cooperation formulated about a decade ago have little relevance now and should not be given much weight. To illustrate, at that time we at McMaster were discussing a broadly based Ph.D. in Business. What we have implemented instead is a specialized Ph.D. in Management Science based on a strong research group. Clearly the scope for cooperation is thereby sharply delimited.[1]

As well, the Committee notes that McMaster has, since 1977, bolstered its faculty and research strength in Management Science/Systems from seven faculty members to twelve. It, therefore, could reasonably be argued that to be viable McMaster's program does not necessarily require the degree of inter-institutional cooperation once envisioned.

The Committee's findings with respect to the application of Council's funding criteria are summarized below:

1. ACADEMIC APPRAISAL

The Council of Ontario Universities (COU) has certified that the programs have passed rigorous academic appraisals and at the time of the appraisals did not require any improvements. The York program was appraised originally in 1971, but in 1983 it underwent a periodic appraisal by COU and was classified as an "a" program, i.e., one that has "achieved a level of good quality" and is "expected to maintain that level of quality over the next seven year period". The McMaster program was appraised successfully in 1978 and underwent a periodic appraisal in 1983, achieving an "a" rating.

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[1] Letter from Dr. Alvin A. Lee to Dr. B. C. Matthews, July 28, 1983.

2. NEED

The Committee in its March 4, 1983 report to Council, summarized, as follows, the historical situation with respect to new doctoral programs in Business:

> In Advisory Memorandum 78-III, Council postponed making any recommendation on any of three new doctoral programs in Business until such time as it had received a report from the Council of Ontario Universities (COU) "regarding the plans for doctoral studies in Business in Ontario and how these plans fit in with the objectives for the first quinquennium set out by Council in Advisory Memorandum 77-VII". COU was unable to submit such a report, and it was agreed, after the abandonment of the sectoral approach to graduate planning, that the individual institutions could forward their respective doctoral programs in Business directly to Council for consideration.

Subsequent to Council's 1978 mini-embargo on new doctoral programs in Business, ACAP issued two reports, one in 1979 and another in 1980, in which ACAP indicated that it could not certify that the three new doctoral programs in Business were consistent with OCUA's objectives and funding criteria for the first graduate planning quinquennium.

The Academic Advisory Committee, in recommending approval of the Queen's program in 1983, stated that:

> With increasing enrolment in Business and Business-related subjects at the master's and undergraduate levels, the need for qualified academics is most urgent if the quality of the programs and the quality of the graduates of the programs are to be maintained. We are also convinced that there are a number of openings in business and government for graduates of this type of program.[2]

The Committee took this statement as a starting-point in its analysis of the need for two more doctoral programs in Business.

There are significant differences between the York and McMaster programs. The Committee eventually concluded that an acknowledged expert in the field should be engaged in order to examine the respective orientations of the programs and whether the programs met a societal need and student demand. The Committee, therefore, recommended to Council that an external consultant be engaged to review the programs with respect to societal need. Council agreed with this recommendation, and Professor Edward A. Silver, professor of Management at the University of Calgary, was engaged as the external consultant. Professor Silver submitted his report on September 26, 1984.

The Committee found Professor Silver's report to be helpful. Professor Silver summarized his report in the following manner:

> In summary, it would appear that there is and will be ample demand to absorb the projected rates of graduation from the two programs, subject to the following qualifications. First, at McMaster care must be taken to ensure that a reasonable proportion of the students major in Systems as opposed to an overwhelming majority being in Management Science. Second, at York there appears to already be a tendency to exceed projections, thus a monitor on numbers is recommended. Moreover, at York care must be taken to avoid a marked imbalance within the different areas of specialization, specifically an over-emphasis in the Organizational Behaviour area as the latter could conceivably lead to eventual problems in the placement of some graduates.[3]

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[2] Ontario Council on University Affairs, *Tenth Annual Report*, 1983-84, p. 22.

[3] Professor Edward A. Silver, *Evaluation of the Market Needs Associated with the Business Doctoral Programs at McMaster and York Universities*, September 26, 1984, p. 1.

The Committee strongly endorses Professor Silver's views on the societal need for the programs and the need for York and McMaster to monitor their programs carefully in the ways recommended.

Professor Silver also makes the following salient points:

a) It is unlikely, because of currency differences and the availability of openings in the United States that Canada will be able to continue to fill faculty Business positions with Americans.

b) There are an estimated 244 unfilled full-time tenure-track faculty positions in Business across Canada in 1984-85, or about 5 positions per institution. The estimated openings per field are:

Function/Discipline		**Estimated Openings**
Accounting		62
Management Information Systems		32
Finance		26
Marketing		28
Operations Research/Management Science *and* Production/Operations Management		23
Management/Organizational Behaviour		32
Industrial Relations		11
Corporate Strategy/Business Policy		9
Unallocated		21
TOTAL	=	244[4]

Professor Silver estimates that there will be three doctorates awarded per year at McMaster and six at York. (However the Committee notes that last year only seven students graduated from doctoral Business programs in Ontario, including York's and McMaster's programs.)

c) An oversupply of graduates from Business programs is unlikely to occur as there were only 18 students graduating across Canada in 1982, the latest year for which statistics are available.

d) OCUA should review every 5 years the situation with respect to enrolment levels and program emphases at McMaster and York.

Because of the critical shortages of Business faculty now and in the foreseeable future, two more doctoral programs are warranted.

The Committee is satisfied that there is a societal need for both programs, and that, with appropriate inducements, there will be a greater student demand for the programs. (There are presently 21 full-time and 9 part-time students enrolled in the York program and seven full-time and three part-time students in the McMaster program.)

3. UNIQUENESS

The McMaster program is unique in its degree of concentration on Management Science and Information Systems. The York program is not significantly different from some of the other programs in the province, but given the situation with respect to the societal need for doctoral graduates, the Committee believes that this is a case of justifiable duplication.

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[4] A survey conducted in 1983 by the Canadian Federation of Deans of Management and Administrative Studies resulted in an estimate of 235 unfilled full-time tenure-track positions. Professor Silver, on the basis of his own representative telephone survey estimates that this figure of 235 should now be increased by 4% or 9 more positions.

4. AIMS, OBJECTIVES AND EXISTING STRENGTHS

The Committee is satisfied that both programs are consistent with the aims, objectives and existing strengths of their respective institutions. Both programs have been in existence for many years, and the institutions involved have made a significant commitment over the years from their existing resources in order to continue to offer the programs.

These programs have appeared consistently in each institution's five-year graduate plans.

5. FUNDING

The Committee, therefore, recommends to Council that:

> the doctoral program in Administrative Studies at York University and the doctoral program in Management Science/ Systems at McMaster University be recommended by Council as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
January 9, 1985.

Appendix B

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS ACADEMIC ADVISORY COMMITTEE

Art History (MA), York University - New Graduate Program Considered for Formula Funding

On March 2, 1984, York University requested that Council consider for funding approval its new Master's program in Art History. Council, according to established procedures, referred the program to its Academic Advisory Committee. The Committee's findings with respect to the application of Council's funding criteria are summarized below:

1. ACADEMIC APPRAISAL

The Council of Ontario Universities has certified that the program has passed a rigorous academic appraisal and, at the time of appraisal, did not require any improvements.

2. NEED

In assessing the societal need for the program, the Committee noted that the emphasis of the program is directed towards the student planning a professional career in Art History immediately upon completion of the M.A.:

> To this end, the York programme combines academic and "practical" training. Our graduates are being prepared to assume positions in the educational departments of large museums and galleries, to act as guest curators of smaller galleries (both private and public), to serve as art consultants or advisors, agents or critics, depending on the programme focus they choose.[1]

York advises that the only two graduates of the program currently hold curatorial positions at the National Film Board and a Calgary museum. Student research projects include: a study of the Samuel Sarick Collection of Inuit Drawings; documenting nineteenth century Southern Ontario architecture; and the curating of various works by Canadian artists.

Since the program's inception in 1981, there has been an average of 13 applicants per year. There have been on average four new registrants per year and total enrolment for 1984-85 stands at 10 students. Since the program's inception, the number of qualified applicants has greatly exceeded the number of candidates admitted.

The Committee is satisfied that there is both a societal need and student demand for the program.

3. UNIQUENESS

Until 1982 when an Art History program at Queen's University was approved for funding, the University of Toronto offered the only funded Art History program in the Province. Both of these programs emphasize Ancient, Medieval, Renaissance, Baroque and Modern studies. The Queen's program also includes some emphasis on Canadian Art. The program at York is solely:

> . . . designed to promote Art History with a Canadian concentration by fully acknowledging this country's increased interest in problems of cultural

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[1] York University, *Response to OCUA Request for Additional Information*, November 29, 1984, p.1.

> heritage, while addressing gaps in many aspects of contemporary Canadian artistic life which current Canadian art historical study fails to fill.
>
> The program focusses on the Canadian heritage in the visual arts. This heritage is defined as works of art made by Canadians and works which have been brought to Canada and . . . found a permanent home here.[2]

The program is specifically designed to meet the needs of students wishing to pursue professional, rather than academic, careers in Art History, but ensures that those wishing to enrol in a doctoral program will be qualified to do so.

The Committee is satisfied that the program is unique and does not duplicate the programs at the University of Toronto and Queen's University.

4. AIMS, OBJECTIVES AND EXISTING STRENGTHS

York is well-known for its strength in the field of Fine Arts, at both the undergraduate and graduate levels. It was, therefore, able to draw on the resources of highly qualified faculty in other fields, such as Visual Arts, when establishing its Master's program in Art History. As well, the faculty associated with the program have the particular academic and professional expertise to instruct and supervise students in Canadian Art History.

The program is included in the institution's five-year graduate plan, and the Committee is satisfied that the program is consistent with the aims, objectives and existing strengths of the University.

5. FUNDING

The Committee, therefore, recommends to Council that:

> the master's program in Art History at York University be recommended by Council as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
January 9, 1985

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[2] York University, *Funding Submission - Art History*, March 2, 1984, p. 2.

Appendix C

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Master's Program in Business Administration (MBA), Laurentian University - New Graduate Program Considered for Formula Funding

On March 5, 1984, Laurentian University requested that Council consider for funding approval its new graduate program in Business Administration. Council, according to established procedures, referred the program to its Academic Advisory Committee.The Committee's findings with respect to the application of Council's funding criteria are summarized below:

1. ACADEMIC APPRAISAL

The Council of Ontario Universities has certified that the program has passed a rigorous academic appraisal and at the time of appraisal did not require any improvements.

2. NEED

The Committee considered several important factors in relation to this criterion. Since 1970 Laurentian has offered a Diploma program in Business Administration. This program has been equivalent to the first year of an MBA. The program has been receiving formula funding and other universities have admitted graduates of this program into the second year of their MBA programs, though sometimes a student may have been required to complete additional courses after admission to meet the needs of a particular program. The Diploma program had average enrolments of 10 full-time and 61 part-time students each year, with satellite part-time programs offered in Timmins, North Bay and Sault Ste. Marie. There appears to have been a consistent student demand for the Diploma program.

To determine the need for the conversion from a diploma offering to a degree offering, Laurentian conducted a survey in 1979 of its Diploma graduates. Laurentian received 410 replies indicating that they would be interested in obtaining an MBA; 370 of that number indicated their preference for pursuing the degree on a part-time basis and of that number 351 said that they would only be able to pursue the program if it were offered in Sudbury.The Committee would have preferred to look at the results of a more current survey, but in the absence of these results, it is satisfied that the situation has probably not changed much since 1979.

The Committee also takes note of the fact that in 1982 Central Michigan University sought to offer an MBA program through Cambrian College. This initiative was withdrawn due to Laurentian's announced intention of offering an MBA.

There will be a demand for the program from those already employed in the region who wish to further their knowledge of business administration and apply this in the workplace to their own and society's benefit. As well, Bachelor of Commerce graduates and holders of other undergraduate degrees will also likely enrol in the program. Of those currently in the program, 70% are from Sudbury and 30% are from other centres in North Eastern Ontario. There are no visa students in the program. The Diploma designation will be maintained for students who achieve a "C" average in the first year of the program. Only those who obtain at least a "B" average will be admitted to the second year of the program. Those students who, prior to September 1983, had obtained a Diploma, will be eligible for admission to the second year of the program.

The Committee is satisfied that there is a student demand and societal need for the program.

3. UNIQUENESS

Though the second year of the program will be offered only on a part-time basis, there are no other significant differences between the Laurentian program and other MBA programs in the province. The Committee believes, however, that the need for regional accessibility to the program is important enough so as to override concerns about program duplication. It must also be remembered that the first year of an MBA program, through the Diploma offering, has been offered and funded for many years at Laurentian. This program will not significantly broaden MBA offerings in the province, but it will fill a societal need in Sudbury and Northeastern Ontario.

4. AIMS, OBJECTIVES AND EXISTING STRENGTHS

As mentioned, Laurentian has been operating a Diploma program in Business Administration since 1970. The requisite teaching-staff and other resources are presently in place. The development of an MBA at Laurentian has been part of the institution's plans for many years and is in line with the overall aims and objectives of the university. The program is included in the institution's five-year graduate plan.

5. FUNDING

The Committee, therefore, recommends to Council that:

> the master's program in Business Administration at Laurentian University be recommended by Council as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
December 10, 1984

Appendix D

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Master of Social Work (MSW), York University - New Graduate Program Considered for Formula Funding

On July 31, 1984, York University requested that Council consider for funding approval its new Master's program in Social Work. Council, according to established procedures, referred the program to its Academic Advisory Committee. The Committee's findings with respect to the application of Council's funding criteria are summarized below:

1. ACADEMIC APPRAISAL

The Council of Ontario Universities has certified that the program has passed a rigorous academic appraisal and at the time of appraisal did not require any improvements.

2. NEED

In assessing the need for another Master of Social Work (MSW) program in the province the Committee considered York's claims that their new program will address specifically the needs of Metropolitan Toronto's multicultural society, and will meet the educational needs of Bachelor of Social Work (BSW) graduates who are employed and, therefore, do not have access to full-time graduate programs in Social Work. York's program is to be offered only on a part-time basis.

The Committee acknowledges the relevance to Metropolitan Toronto of the multicultural orientation of the curriculum. However, in assessing the criterion of "Need", the part-time nature of the program is considered to be a more persuasive factor than its multicultural focus. The Committee notes that the other MSW program in the Toronto area (at the University of Toronto) is offered only on a full-time basis. Therefore, York's program is the only one available for those social workers in the Toronto area who wish to further their knowledge and upgrade their skills.

The student demand for York's part-time MSW program, which began in September 1984, is quite evident. Over 100 applications were received and although 75 met the admission requirements for the program, enrolment was limited to 12 highly qualified students. Each of the students admitted to the program has at least seven years' experience in the social work field and all but one of them have a BSW. The enrolment is limited to an intake of 10-15 students per year, and the Committee is confident that the ratio of applicants to places available in the program will continue to remain high.

The Committee is satisfied that there is both a societal need and student demand for the program.

3. UNIQUENESS

The Committee recognizes that York's program contains several innovative features, including an exclusively part-time orientation, a multicultural focus and a required thesis, which must be in the area of multicultural social work.

The program at York is structured so as to prepare social work professionals in one of three areas of specialization: Mental Health, Family and Children's Services and Social Policy and Planning. While these areas of specialization are covered in some of the other six MSW programs currently offered in the province, York's program is unique in that it emphasizes multiculturalism in the course-work, practicum and the compulsory thesis components.

As noted above, the MSW program at the University of Toronto is offered on a full-time basis only. The other MSW programs in Ontario - at Wilfrid Laurier, Carleton, Windsor and the Master of Arts in Social Welfare Policy program at McMaster - have both full-time and part-time students. However, the York program is the only one designed specifically for part-time students.

4. AIMS, OBJECTIVES AND EXISTING STRENGTHS

York currently offers a Bachelor of Social Work program and the requisite teaching-staff and other resources are in place. The MSW program will draw on the existing strengths of other graduate programs (Sociology, Social Anthropology, Environmental Studies and Political Science), where a number of faculty are involved in research and teaching related to multiculturalism. The York MSW program is included in the university's five-year graduate plan.

5. FUNDING

The Committee, therefore, recommends to Council that:

> the master's program in Social Work at York University be recommended by Council as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
January 9, 1985.

Appendix E

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Doctoral Program in Linguistics (PhD), University of Ottawa - New Graduate Program Considered for Formula Funding

On July 31, 1984, the University of Ottawa requested that Council consider for funding approval its new Doctoral program in Linguistics. Council, according to established procedures, referred the program to its Academic Advisory Committee. The Committee's findings with respect to the application of Council's funding criteria are summarized below:

1. ACADEMIC APPRAISAL

The Council of Ontario Universities has certified that the program has passed a rigorous academic appraisal and, at the time of appraisal, did not require any improvements.

2. NEED

In assessing the question of need, the Committee noted that, since the program's inception in 1981, students have regularly been turned away due to a lack of available places.

The University of Ottawa, in its submission, advises that graduates of the program have found employment in teaching positions at other Ontario universities, and can also expect to find employment in special education, psychology, business and government. The University of Ottawa also states that:

> . . . the Department of Linguistics at the University of Ottawa is called upon to participate in work that ranges from language teaching through para-medical services to the new computer and information technologies . . . two of its members have recently acted as consultants to an artificial intelligence project funded by the Federal Government seeking to develop an intelligent question-answer programme for specialized knowledge systems. Given the development of immersion education and the burgeoning role of information and communication technology, the demand for highly qualified participants in these and related areas can only increase.[1]

The Committee is satisfied that there is a student demand and societal need for the program.

3. UNIQUENESS

The only other linguistics program in Ontario is at the University of Toronto.The uniqueness of the Ottawa program lies in its bilingual nature and the Committee notes, as well, the pronounced emphasis in the program on the interrelationship between theoretical and applied linguistics. The University of Ottawa indicates that:

> First among . . . more specific attributes of the programme which render it unique . . . must be considered the *bilingual* nature of the Ph.D. programme, which has evident advantages in the Canadian context. In addition to being submitted to formal language requirements, students are placed in a situation where the courses they take may be taught, depending on year, in either English or French. In academic terms, this contact with the two languages has important benefits, since a student working in syntax, say,

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[1] *Request for Funding, Ph.D. Programme in Linguistics, University of Ottawa*, 31 July, 1984, p. 2.

> will encounter a significantly *different scientific tradition* if he does his research in and on French as opposed to English. Much the same may be said of other domains. In practical terms, moreover, students will have passed through a programme where they will have had actually worked in both languages. Once again, this experience is particularly relevant for those who will pass to the governmental or educational milieux.
>
> Secondly, the structure of the doctoral programme emphasizes the inter-penetration and mutual reinforcement of the theoretical and the applied branches of linguistics. All students must do work in both the theoretical core and in at least one applied area, and many professors combine research in both domains. . .[2]

The Committee is satisfied that Ottawa's doctoral program in Linguistics is unique.

4. AIMS, OBJECTIVES AND EXISTING STRENGTHS

The University of Ottawa has established strengths in its existing master's program in Linguistics and has collateral strengths in Education and Psychology. The Committee is also aware of the importance which Ottawa attaches to its *Centre de recherche en civilisation canadienne - francaise* as a collateral strength, and notes that members of Ottawa's Linguistics department "are involved in sponsored research projects at the Centre dealing with the Francophone population in the Ottawa area"[3]. The program is included in the institution's five-year graduate plan, and the Committee is satisfied that the program is consistent with the aims, objectives and existing strengths of the University.

5. FUNDING

The Committee, therefore, recommends to Council that:

> the doctoral program in Linguistics at the University of Ottawa be recommended by Council as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
January 9, 1985.

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[2] *Ibid.*, p. 3.
[3] *Ibid.*, p. 5.

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Doctoral Program in Economics (PhD), York University - New Graduate Program Considered for Formula Funding

On January 26, 1983, York University requested that Council consider for formula funding approval its new doctoral program in Economics. Council, according to established procedures, referred the program to its Academic Advisory Committee. The Committee's findings with respect to the application of Council's funding criteria are summarized below:

1. ACADEMIC APPRAISAL

The Council of Ontario Universities (COU) has certified that the program has passed a rigorous appraisal and, at the time of the appraisal, did not require any improvements.

2. NEED AND UNIQUENESS

In examining the question of the need for this program, the Committee began by reviewing COU's 1973 discipline assessment of Economics. In 1973, there were four doctoral programs in Economics. The consultants who conducted the review at that time felt that when doctoral enrolment in Economics in Ontario reached 220 students, and there were signs of continued growth, the desirability of establishing a fifth doctoral program should be examined.[1] Presently, there are 7 doctoral programs, including the University of Guelph's specialized program in Agricultural Economics and York's unfunded program. COU did not endorse the threshold figure of 220, which assumed a visa student enrolment of approximately 15%, but the Committee found it instructive to analyze the suggested threshold in light of the 1983-84 enrolment in Economics.

In 1972-73, the total enrolment in Economics at the doctoral level was 209, with 178 (or 86.2%) students being Canadian citizens or landed immigrants. The total doctoral enrolment in the 7 programs in the system in 1983-84 was 282 students, 178 or 64.2% of whom were Canadian citizens or landed immigrants. Clearly, despite the fact that there are at present 3 more programs than there were in 1972-73, the greater student demand for the programs has been from visa students rather than from Canadian citizens or landed immigrants.

The Committee examined existing and projected program capacities in the six funded Economics programs. After a survey of the programs involved, the Committee is convinced that there are existing unused capacities within the funded programs - certainly enough to accommodate York's current small enrolment of 15 students.

Dr. L. A. K. Watt, Executive Vice-Chairman of the Ontario Council on Graduate Studies was asked what COU's position was on York's program today in light of some of the cautions contained in the 1973 ACAP Discipline Assessment of Economics. He replied that York's new program was consistent with COU's position that:

> Universities wishing to introduce small, limited-enrolment, specialized PhD programmes and able to obtain a favourable appraisal should be free to introduce such programmes. . .[2]

However, given that there does not appear to be a growing demand for doctoral programs in Economics from Ontario and Canadian residents, the Committee remained concerned about the need for another program whether unique or not. Therefore, the

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[1] Council of Ontario Universities, *Perspectives and Plans for Graduate Studies - Economics*, 1973, p. 2 of the Advisory Committee on Academic Planning Report.

[2] Letter from Dr. L.A.K. Watt to Mrs. Marnie Paikin, April 4, 1984.

Committee requested that Council engage an expert external consultant in order to examine the questions of need and program uniqueness. Council endorsed the Committee's request and Professor Anthony Scott of the University of British Columbia was engaged as the consultant.

Professor Scott stated that York's special emphasis is significantly different from other programs in Ontario, but also that "it would not be very difficult for a Ph.D. student to learn at the other schools what he would apparently be routinely offered at York".[3] On the question of "need", Professor Scott commented: "I would say that Ontario and Canada "need" this program, as much as they need any small, but well-established, professional training program."[4] He was unable to indicate that there is a *definite* need for the program - something which must be documented carefully given that six funded doctoral programs already exist.

The Committee is not satisfied that the York program will meet a societal need that could not be met by the six presently funded programs in the province. As the program does not meet, in the Committee's opinion, all of Council's funding criteria for new graduate programs, the Committee, therefore, recommends to Council that:

> the doctoral program in Economics at York University not be recommended by Council as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
February 13, 1985

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[3] Letter from Professor Anthony Scott to Mrs. Marnie Paikin, September 4, 1984, p.

[4] *Ibid*, p. 5.

84-VIII Undergraduate Quasi-Professional Program Funding -

**Office Management Studies (BA), Laurentian University;
Criminology (BSocSc), University of Ottawa;
Teaching English as a Second Language (BA) and (BEd) , Brock University;
Music Therapy (BMT), Wilfrid Laurier University**

In this memorandum, Council offers advice on five new undergraduate quasi-professional programs. They were considered in accordance with the procedures set out in Advisory Memorandum 82-VII. In three instances, the programs were considered by Council after receiving advice from its Academic Advisory Committee. In the other two instances, Council was able to deal with the programs directly - in one case because the program was originally submitted while the undergraduate "freeze" was still in place and in the other case because the submission needed only a cursory examination.

At the request of the Ministry, Council offers advice for the first time on the weight which should be applied for each program.

Office Management Studies (BA), Laurentian University (Nipissing)

On June 15, 1982, Nipissing University College, an affiliate of Laurentian University, requested that Council consider exempting from the then existing undergraduate freeze its new program in Administrative Studies. Council referred the program to its Program Committee, which decided that the program should be circulated to the university system for comment. The institutional responses were generally supportive, but some criticisms relating to the program's content and title designation were made. No institution indicated that any existing program's viability would be threatened by the introduction of the Nipissing program, and it was felt that the new program did not duplicate existing programs. The institutional responses were reviewed by the Program Committee and circulated to Nipissing for comment.

1. PROPOSED CURRICULUM

As mentioned above, there were some concerns about the proposed curriculum. Council, however, is satisfied that the curriculum is appropriate for Nipissing. The major difference between Nipissing's program and the program upon which it is generally modelled, the Administrative Office Management Studies program at the University of Western Ontario, is that three extra full courses in office studies are designated as non-credit due to a strong feeling within Nipissing's Academic Council that "university credit should be restricted to traditional subject matter courses".[1] The other courses within the program would be composed of existing courses at Nipissing in English and Commerce along with several electives to be chosen from existing course offerings, for a total of 15 credit courses in a three-year program.

Council, however, concluded that the program's title should be changed. Subsequently, Nipissing and Laurentian concurred that "Office Management Studies" would be a more appropriate title.

2. ACADEMIC QUALITY

After approval by Nipissing's Academic Council, the program was examined by three councils at Laurentian - Social Science, Humanities and Professional Schools. It was then approved by Laurentian's Senate.

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[1] Letter from Dr. George J. Zytaruk to Dr. B.C. Matthews, April 12, 1983, p. 2.

3. FINANCIAL VIABILITY

The program can be offered utilizing existing resources. As the establishment, for instance, of a complete four-year program in Commerce at Nipissing would entail very significant additional resources, the decision instead to develop this program is an appropriate and realistic one. Council is satisfied that the program will be financially viable.

4. PROJECTED ENROLMENT

Nipissing projects a steady-state enrolment of fifty to sixty students, which, based on the number of local inquiries concerning the program, appears to be a sound assumption .

5. INTER-INSTITUTIONAL CO-OPERATION

Canadore College supports Nipissing's initiative in offering this program and is assisting in the development of the non-credit courses. These courses, though, will be Nipissing courses and not Canadore courses.

6. NEED - SOCIETAL AND STUDENT DEMAND

As indicated above, Council is satisfied that there will be a student demand for the program. Nipissing cites the following areas of opportunity for graduates of the proposed program:

- teaching in the CAATs in Secretarial and Business programs
- office work in the following sectors: construction, manufacturing, transportation, retail and wholesale, merchandising, publishing and communications, entertainment, finance, medical and legal services, and government.

Council is satisfied that this program will meet a regional need.

7. UNIQUENESS

As stated, there are similarities between the Nipissing and Western programs, but they are not identical. However, the regional need for the program, especially for part-time students, is an important facet of the Nipissing program.

8. LOCAL, REGIONAL SUPPORT

Council is aware of the increasing pressure on northern institutions to offer applied, "relevant" programs. This program would appear to meet some of that demand.

9. INSTITUTIONAL APPROPRIATENESS

The program is ideally designed to exploit some of Nipissing's existing array of undergraduate course offerings. Given the resources available, the program is an appropriate development.

10. FUNDING IN A TIME OF CONSTRAINT

On balance, Council believes that this program is deserving of funding in a time of constraint. It will allow more students to pursue commerce-oriented work in the North Bay area, will not involve significant additional resources, and will meet a regional need for the upgrading of skills and the demand for more applied studies. Most other institutions within the system have either endorsed the proposal or see it as not having any adverse effect on their offerings and enrolments.

Accordingly, Council *recommends to the Minister*:

OCUA 84-27
FUNDING FOR THE BACHELOR'S PROGRAM IN OFFICE MANAGEMENT STUDIES AT LAURENTIAN UNIVERSITY (NIPISSING UNIVERSITY COLLEGE) FOR 1986-87

THAT the B.A. program in Office Management Studies at Laurentian University (Nipissing University College) be deemed eligible for formula support beginning in 1986-87, and that eligible enrolment, from 1985-86 on, be included in the moving average for the university - the program to be in Category 1, with a weight of 1, as outlined in the Ministry's *Operating Formula Manual*.

Criminology (Honours B.Soc.Sc.) University of Ottawa

On October 12, 1984, the University of Ottawa requested that Council consider for funding approval its proposal for an honours bachelor of social science program in Criminology. Council dealt directly with this proposal without referring it to its Academic Advisory Committee.

The University of Ottawa currently offers a 3-year bachelor's program in Criminology and it now proposes to offer an honours program as well. Therefore, Council's consideration of the program is guided by a letter of February 9, 1983 from Dr. B. C. Matthews to Mr. S. Levy (see Appendix A) concerning a similar situation at York University. Council is of the opinion that the circumstances surrounding the Ottawa proposal are such that it falls clearly within the second category as outlined in Appendix A.

Council notes that the implementation of an honours program in Criminology at the University of Ottawa will permit students in the ordinary program to pursue their studies in greater depth and enable them to compete more effectively for employment and graduate work opportunities in the Criminology field.

In addition to the bachelor's program, Ottawa currently offers a Master's program in Criminology and a Master of Criminology (Applied). The implementation of an honours program will permit Ottawa to reorganize its two-year (6 trimesters) graduate programs along the lines of standard graduate programs in criminology of three trimesters' duration.

Ottawa projects an enrolment in the program of 55 students in 1985-86, increasing to between 85-95 students in the years 1986-87 to 1989-90. As the resource implications of the proposal are minimal and as the introduction of a fourth year will allow Ottawa to reorganize its graduate offerings in this field, Council believes that the program should be funded even in a time of economic constraint.

Accordingly, Council *recommends to the Minister:*

OCUA 84-28
FUNDING FOR THE HONOURS BACHELOR'S PROGRAM IN CRIMINOLOGY AT THE UNIVERSITY OF OTTAWA FOR 1986-87

THAT the Honours B.Soc.Sc. program in Criminology at the University of Ottawa be deemed eligible for formula support beginning in 1986-87 and that eligible enrolment, from 1985-86 on, be included in the moving average for the university - the program to be in Category 2, and the upper year's enrolment to carry a weight of 1.5, as outlined in the Ministry's *Operating Formula Manual*.

Teaching English as a Second Language (BA) (BEd), Brock University

Council has reviewed the advice of its Academic Advisory Committee concerning Brock University's new combination of programs in Teaching English as a Second Language (see Appendix B). While recognizing that the BEd program is intended to follow the BA program as a continuum of courses in training TESL students, Council notes that each degree may be awarded separately. Therefore, Council has assessed these programs separately.

Council is persuaded by the Committee's findings that the programs should be funded even in a time of economic constraint. The programs clearly build upon Brock's established initiatives in the TESL area, do not duplicate similar offerings at other universities and will meet a clear and continuing societal need and student demand.

Accordingly, Council *recommends to the Minister*:

OCUA 84-29
FUNDING FOR THE BACHELOR OF ARTS PROGRAM IN TEACHING ENGLISH AS A SECOND LANGUAGE AT BROCK UNIVERSITY FOR 1986-87

THAT the BA program in Teaching English as a Second Language at Brock University be deemed eligible for formula support beginning in 1986-87 and that eligible enrolment, from 1985-86 on, be included in the moving average for the university - the program to be in Category 1, with a weight of 1, as outlined in the Ministry's *Operating Formula Manual*.

OCUA 84-30
FUNDING FOR THE BACHELOR OF EDUCATION PROGRAM IN TEACHING ENGLISH AS A SECOND LANGUAGE AT BROCK UNIVERSITY FOR 1986-87

THAT the BEd program in Teaching English as a Second Language at Brock University be deemed eligible for formula support beginning in 1986-87 and that eligible enrolment, from 1985-86 on, be included in the moving average for the university - the program to be in Category 3, with a weight of 2, as outlined in the Ministry's *Operating Formula Manual*.

Music Therapy (BMT), Wilfrid Laurier University

Council has examined the advice of its Academic Advisory Committee with respect to Wilfrid Laurier University's new program in Music Therapy (see Appendix C). Council notes that the program is unique; enjoys the support of the Canadian Association for Music Therapy; is endorsed by other universities within the Ontario system; will not entail substantial additional resources; and will meet a defined societal need. Council is, therefore, prepared to recommend approval of this program even in a time of economic constraint.

Accordingly, Council *recommends to the Minister*:

OCUA 84-31
FUNDING FOR THE BACHELOR'S PROGRAM IN MUSIC THERAPY AT WILFRID LAURIER UNIVERSITY FOR 1986-87

THAT the BMT program in Music Therapy at Wilfrid Laurier University be deemed eligible for formula support beginning in 1986-87 and that eligible enrolment, from 1985-86 on, be included in the moving average for the university - the program to be in Category 2, and the upper year's enrolment to carry a weight of 1.5, as outlined in the Ministry's *Operating Formula Manual*.

M. Paikin
Chairman
February 22, 1985.

Appendix A

Ontario

Ontario
Council on
University
Affairs

416/965-5233

7th Floor
700 Bay Street
Toronto, Ontario
M5G 1Z6

February 9, 1983

Mr. S. Levy
Assistant Vice-President
(Academic Planning)
York University
Downsview, Ontario

Dear Mr. Levy

In your letter of January 19, 1983, you raised certain questions which are matters of interpretation of Council's Advisory Memorandum 82-VII. I now have the following interpretations:

1. If a university offers a program in core arts and science at the ordinary level and wishes to offer the same program at the honours level, or vice versa, it may do so and be funded without prior recommendation by Council and approval of the Minister. The "new" offering would, however, have to be included in the institution's annual report to Council listing new programs in arts and science.
2. If a university offers a program in a quasi-professional area at the ordinary level and wishes to offer the same program at the honours level, or vice versa, it must forward the proposal to OCUA for a recommendation and Ministerial approval. Of course, Council's review in this circumstance will undoubtedly, in most instances, be of a cursory nature.
3. If a university offers an approved program in one unit (Faculty) of the institution, itr may offer the *same* program in another unit without reporting to Council or seeking further approval.

Yours sincerely,

B. C. Matthews
Chairman

BCM:dd

(Original signed by Dr. B. C. Matthews)

Appendix B

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Teaching English As A Second Language (BA), (BEd), Brock University - New Quasi-Professional Undergraduate Program Considered for Formula Funding

On January 3, 1984 Brock University requested that Council consider for funding approval its new, undergraduate quasi-professional programs in Teaching English as a Second Language (TESL). Council, according to established procedures, circulated the program proposals to the Council of Ontario Universities (COU) which, in turn, asked for and received advice concerning the proposals from its Vice-Presidents' Academic Group. Council referred the programs and COU's comments to the Academic Advisory Committee (AAC), and asked for specific recommendations relating to Brock's programs. The Committee's findings with respect to the programs are summarized below:

1. PROPOSED CURRICULUM

Teaching English as a Second Language (TESL) is offered in two stages. During the first three years, students must take a combined major involving theoretical courses at the bachelor's level in TESL and Linguistics and a major in one of the humanities, social science or science disciplines. Students must have a Grade 13 credit in a second language or must take at least one university-level language course. Students with a relevant degree may be accepted directly into the fourth year of the TESL program. The fourth year consists of five courses in TESL offered by the College of Education at Brock. To teach in the province of Ontario at the elementary or secondary school level, students would have to complete additional course requirements for certification. The College of Education courses cannot be credited toward an Honours BA. Rather students completing the entire four years of the TESL program will receive an Ordinary three-year BA plus a BEd degree. The fourth year of the program is the practical component.

2. ACADEMIC QUALITY OF THE PROGRAM

The Committee notes that the program has received extensive internal examination at Brock, and has been approved by the Senate.

3. FINANCIAL VIABILITY OF THE PROGRAM

The Committee believes that the resource requirements of the program are not substantial. Additional faculty are not required since they will be drawn from the existing staff of the Centre for English Languages Program (CELP), and will teach in both the BA and BEd program. The university states that the program will be financially viable and will not place a significant strain on existing resources.

4. PROJECTED ENROLMENT

For 1985-86, Brock University projects a steady-state enrolment of 110 full-time and 15 part-time students.

5. CO-OPERATION WITH OTHER POST-SECONDARY INSTITUTIONS

As there is no similar program in the Ontario university system, there is at present no inter-institutional co-operation.

6. NEED-STUDENT AND SOCIETAL DEMAND

The Committee is satisfied that there is a significant student demand for a program of this kind, considering the present enrolment of 100 full-time students and six part-time students. With regard to societal need, the TESL Association of Ontario states that:

> . . . the increased availability of such professional programmes in the field of Teaching English as a Second Language is of benefit to the profession as a whole. Brock University is to be commended for its attempt to address the issue of academic and professional training in this particular way.[1]

The Brock program, while preparing those who wish to teach at the elementary or secondary school level in Ontario, will qualify students to teach in the community college system, language institutes and in other community-based organizations offering English as a Second Language courses. As well, graduates of the program will be qualified to teach ESL courses overseas. The opportunity to teach overseas, and so experience first-hand the various cultural and linguistic difficulties of non-native English speakers, will be of benefit to graduates of the program who choose to pursue this line of employment.

Given the multi-cultural nature of Canada and the consequent need for instruction for Canadian residents whose native tongue is not English, the Committee is satisfied that graduates of the program are likely to obtain employment.

7. PROGRAM UNIQUENESS

As noted above, no similar program exists in Ontario, and so the Committee is satisfied that the program in unique. There are TESL courses offered by other universities but none offers a complete degree program, combining theory and practice, and with the depth and breadth of the Brock program.

8. LOCAL AND REGIONAL SUPPORT FOR THE PROGRAM

In its funding submission, Brock notes the support and interest of the local Boards of Education and multi-cultural groups in the program, and the ongoing discussions in this regard between these boards and groups and the Director of CELP. Brock's staff is also involved in local TESL activities, such as "in-service workshops", colloquia and the various projects of TESL Niagara, the local affiliate of TESL Ontario.

9. INSTITUTIONAL APPROPRIATENESS

The program draws on Brock's already established strengths in its Centre for English Language Programs, its Arts and Science offerings and College of Education. A substantial number of students enrol each year in Brock's non-degree programs in English as a Second Language - there are some 40 sections per semester, with a total enrolment of about 200-250 students. The students come from over 40 different countries. Therefore, TESL students have an excellent opportunity during the practicum component of their program, i.e. in fourth year, for practical "hands-on" experience in the classroom. As well, the fourth year of the program will be offered within Brock's well-established College of Education.

The Committee also notes that Brock is apparently becoming well-known as a centre for studies in TESL. Brock has negotiated contracts with several foreign governments and institutes, including the People's Republic of China, which will be sending 15 to 25 TESL teachers to enrol in the Brock program.

As mentioned above, comment about the program was received from Vice-Presidents' Academic Group of COU. Institutional responses indicated that the program would appear to be appropriate to the university and that the program had both institutional and local community support.[2]

The Committee, therefore, is satisfied that the program is an appropriate one for Brock University.

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1. Letter from Mr. G. Laroque to Mrs. Marnie Paikin, April 4, 1984.
2. Letter from Dr. Edward J. Monahan to Mrs. Marnie Paikin, December 10, 1984.

10. FUNDING

The Committee therefore recommends that:

> Brock University's programs in Teaching English as a Second Language, having satisfied all of Council's requirements for new undergraduate quasi-professional programs, be recommended to the Minister as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
February 13, 1985

Appendix C

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS ACADEMIC ADVISORY COMMITTEE

Music Therapy (BMT), Wilfrid Laurier University - New Quasi-Professional Program Considered for Formula Funding

On March 22, 1984, Wilfrid Laurier University requested that Council consider for funding approval its new, quasi- professional, undergraduate program in Music Therapy. Council, according to established procedures, circulated the program proposal to the Council of Ontario Universities (COU) which, in turn, asked for and received advice from its Vice-Presidents' Academic Group. Council referred COU's comments to the Academic Advisory Committee and asked for specific recommendations relating to the Wilfrid Laurier program. The Committee's findings with regard to the program are summarized below.

1. PROPOSED CURRICULUM

The Canadian Association for Music Therapy endorsed the curriculum, noting that:

> The course requirements appear to be well-integrated and are approached from an inter-disciplinary perspective.[1]

The four-year degree program comprises 23 two-term courses of which seven must be in psychology and sociology, eleven in music and three and a half in music therapy.

2. ACADEMIC QUALITY OF THE PROGRAM

The Committee notes that the program has undergone extensive internal examination at Wilfrid Laurier University and has been approved by the Senate.

3. FINANCIAL VIABILITY OF THE PROGRAM

Wilfrid Laurier University notes in its proposal that it anticipated the need for one, full-time music therapist "by the time the third year of the program is available".[2] All other staff members will be drawn from existing faculties at the University. The Committee believes that the resource requirements of the program are, therefore, not substantial.

4. PROJECTED ENROLMENT

Wilfrid Laurier University plans to launch the program in 1985-86 with a projected first-year enrolment of twelve students.

5. CO-OPERATION WITH OTHER POST-SECONDARY INSTITUTIONS

As no similar program exists in Ontario's post-secondary system, co-operation with other institutions is not warranted at this time.

6. NEED - STUDENT AND SOCIETAL DEMAND

The Canadian Association for Music Therapy draws attention to the fact that:

> . . . the only other Canadian Music Therapy training program is located in Vancouver, B.C. at Capilano College and is a two-year Community College Diploma program. It is very desirable that Music Therapy Training be made available at a university level as this will meet the educational needs

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[1] Letter from Ms. Valerie Ivy to Mrs. Marnie Paikin, December 1, 1984.

[2] *Proposal for a Program in Music Therapy*, Wilfrid Laurier University, March 1984, p. 1.

> of many students currently leaving Canada to attend universities in the United States, Britain and Europe.[3]

Wilfrid Laurier also notes that applications for the program received at Capilano College during the last three years totalled 300. The University expects graduates of its program to find employment working in all areas of therapy with psychologists, speech therapists and psychiatrists and it has been suggested that the training received by students of the program is particularly beneficial for work with autistic children and terminal cancer patients, and for re-educating stroke victims in the art of speech.

The Committee is satisfied that a student demand exists for the program and that graduates thereof are likely to obtain employment in their chosen field.

7. PROGRAM UNIQUENESS

As no similar program exists in Ontario, the Committee is satisfied that the program is unique.

8. LOCAL AND REGIONAL SUPPORT FOR THE PROGRAM

In the preliminary stages of setting up the program, representatives of the University met with and were supported and encouraged in their endeavour by the Canadian Association for Music Therapy, and music therapists at the Oxford Regional Centre in Woodstock. Students of the psychology program, as part of their course work, have completed field placement work through involvement with such local agencies as the Canadian Mental Health Association, local schools, the Rotary Centre and Project HEAR and these should provide appropriate locations for students of the Music Therapy program.

9. INSTITUTIONAL APPROPRIATENESS

Acknowledging the interdisciplinary nature of the program, Wilfrid Laurier University has drawn heavily on the existing strengths of its Psychology, Music, Sociology and Social Work departments. As well, comments received from COU's Vice-Presidents' Academic Group indicate that the proposal is "realistic in terms of design, expected enrolment and strategy for implementation".[4]

The Committee believes that it is appropriate for Wilfrid Laurier University to offer this program.

10. FUNDING

The Committee therefore recommends that:

> Wilfrid Laurier University's program in Music Therapy, having satisfied all of Council's requirements for new, quasi-professional, undergraduate programs, be recommended as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
February 13, 1985

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[3] Letter from Ms. Valerie Ivy to Mrs. Marnie Paikin, December 1, 1984.

[4] Letter from Dr. Edward J. Monahan to Mrs. Marnie Paikin, dated August 7, 1984.

OCUA Public Meetings 1984-5

OCUA Public Meetings 1984-5

In view of the expected activities of the Commission on the Future Development of the Universities of Ontario, the Ontario Council on University Affairs cancelled its 1984 Spring Hearings, and met only with the Council of Ontario Universities.

Date	Institution or Organization and Place of Meeting
April 27, 1984	Council of Ontario Universities (Queen's Park)

OCUA Recommendations and Government Responses, 1984-85

OCUA Recommendations and Government Responses, 1984-85

Recommendation Number	Title	Response
	Advisory Memorandum 84-I:	
84-1	Compulsory Ancillary Fees	Accepted
84-2	Compulsory Ancillary Fees and the Ontario Student Assistance Program.	Accepted
	Advisory Memorandum 84-II:	
84-3	Funding for the Master's Program in Visual Arts at the University of Windsor for 1986-87.	Accepted
84-4	Funding for the Master's Program in Industrial Relations at Queen's University for 1986-87.	Accepted
	Advisory Memorandum 84-III:	
84-5	Government Operating Grants for 1985-86 to meet Costs of Council's Basic Objectives in Funding provincially-assisted Universities and their affiliated Colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College.	Not Accepted
84-6	Formula Fee Rates for 1985-86 to meet the Costs of Council's Basic Objectives.	Not Accepted
84-7	Funding for 1985-86 for the Bar Admission Course.	Not Accepted
84-8	Equipment and Library Funding for 1985-86.	Not Accepted
84-9	Level of Support for Major Repairs, Renovations and Replacement Projects in 1985-86.	Not Accepted
	Advisory Memorandum 84-IV:	
84-10	Ontario Graduate Scholarship Stipends	Partially Accepted (see Minister's letter of June 4, 1985 which follows this table)
84-11	Institutional Awards to Universities without Doctoral Programs.	Accepted
84-12	Ontario Graudate Scholarships to Persons on Student Visas.	Accepted
84-13	Number of Ontario Graduate Scholarship Awards in 1985-86.	Accepted
	Advisory Memorandum 84-V:	
84-14	Mechanism for existing Degree and Diploma Program Approval at Ryerson Polytechnical Institute.	Accepted
84-15	Mechanism for new Degree and Diploma Program approval at Ryerson Polytechnical Institute.	Accepted

	Advisory Memorandum 84-VI:	
84-16	Funding for the New Degree Program in Fashion at Ryerson Polytechnical Institute.	Accepted
84-17	Funding for the new Degree Program in Aerospace Technology at Ryerson Polytechnical Institute.	Accepted
84-18	Funding for the new Degree Program in Applied Economics at Ryerson Polytechnical Institute.	Accepted
	Advisory Memorandum VII:	
84-19	Funding for the Doctoral Program in Management Science Systems at McMaster University for 1986-87.	Accepted
84-20	Funding for the Doctoral Program in Administrative Studies at York University for 1986-87.	Accepted
84-21	Funding for the Master's Program in Art History at York University for 1986-87.	Accepted
84-22	Funding for the Master's Program in Business Administration at Laurentian University for 1986-87.	Accepted
84-23	Funding for the Master's Program in Social Work at York University for 1986-87.	Accepted
84-24	Funding for the Doctoral Program in Linguistics at the University of Ottawa for 1986-87.	Accepted
84-25	Funding for the Doctoral Program in Economics at York University	Accepted
84-26	Funding for the Master's Program in German at the University of Western Ontario, the Master's Program in Romance Languages at Wilfrid Laurier University and the Master's Program in French at the University of Windsor.	Accepted
	Advisory Memorandum 84-VIII:	
84-27	Funding for the Bachelor's Program in Office Management Studies at Laurentian University (Nipissing University College) for 1986-87.	Accepted
84-28	Funding for the Honours Bachelor's Program in Criminology at the University of Ottawa for 1986-87.	Accepted
84-29	Funding for the Bachelor of Arts Program in Teaching English as a Second Language at Brock University for 1986-87.	Accepted
84-30	Funding for the Bachelor of Education Program in Teaching English as a Second Language at Brock University for 1986-87.	Accepted
84-31	Funding for the Bachelor's Program in Music Therapy at Wilfrid Laurier University for 1986-87.	Accepted

Response to Advisory Memorandum 84-IV

Ontario

Office of the Minister

Ministry of Education
Ministry of Colleges and Universities

Mowat Block
Queen's Park
Toronto, Ontario
M7A 1[illegible]
416 [illegible]-5277

June 4, 1985

Mrs. Marnie Paikin
Chairman
Ontario Council on University Affairs
LuCliff Place
700 Bay Street, 7th Floor
Toronto, Ontario
M5G 1Z6

Dear Mrs. Paikin

Thank you for your letter of October 25, 1984, enclosing the Council's Advisory Memorandum 84-IV on the Ontario Graduate Scholarship Program, 1985-86.

I am pleased to advise that Recommendation 84-10 concerning the value of the scholarship has been accepted.The stipend value of the scholarship has been increased from $2,035 per term to $2,435 per term. This will provide a graduate student with a maximum of $7,305 for a full year of study.

With an increase in allocation to the Ontario Graduate Scholarship Program of approximately 5 percent, and the recommended increase in the stipend value, it will not be possible to increase the number of scholarships awarded. This number will, therefore, remain at 1,200 and, as proposed in Recommendation 84-13, it will include forty-five (45) institutional awards and sixty (60) visa student awards.

I am looking forward to receiving the findings of the Council's Special Review of the OGS program and any recommendations Council may make as a result of this review.

Yours very truly,

Larry Grossman
Minister